Course: FamLink Fundamentals **Topic:** Case Notes

Overview

Case notes are narrative records of activities associated with a case. You can categorize case notes by program, such as CFWS or FVS, and by type, such as contact, visitation, or legal. You can include many activities within a case note, such as relative contacts and supervisory reviews. You can create certain case notes when you feel you need them. However, some types of case notes *must* be created. For example, you must make a case note during a CPS investigative assessment to record the initial face-to-face contact with the child.

You can create and edit a case note as needed. You can search for notes using various search criteria. You can associate a case note to a provider note. You also can view or print notes created by other staff.

Any worker with security access to the **Case Notes** page can create a case note. This means you do not have to be assigned to the case to create a note for it. However, only the worker who created the note or that worker's supervisor can edit the note, if the edit date is within 30 days of creating the note.

There are several ways to open the **Case Notes** page. Most methods start from the FamLink Desktop.

Workflow

1. Open the **Case Notes** page. ➡ 2. Complete the case note details. ➡ 3. Save the note. ➡ 4. Associate the case note to a provider note. ➡ 5. Edit, view or print notes.

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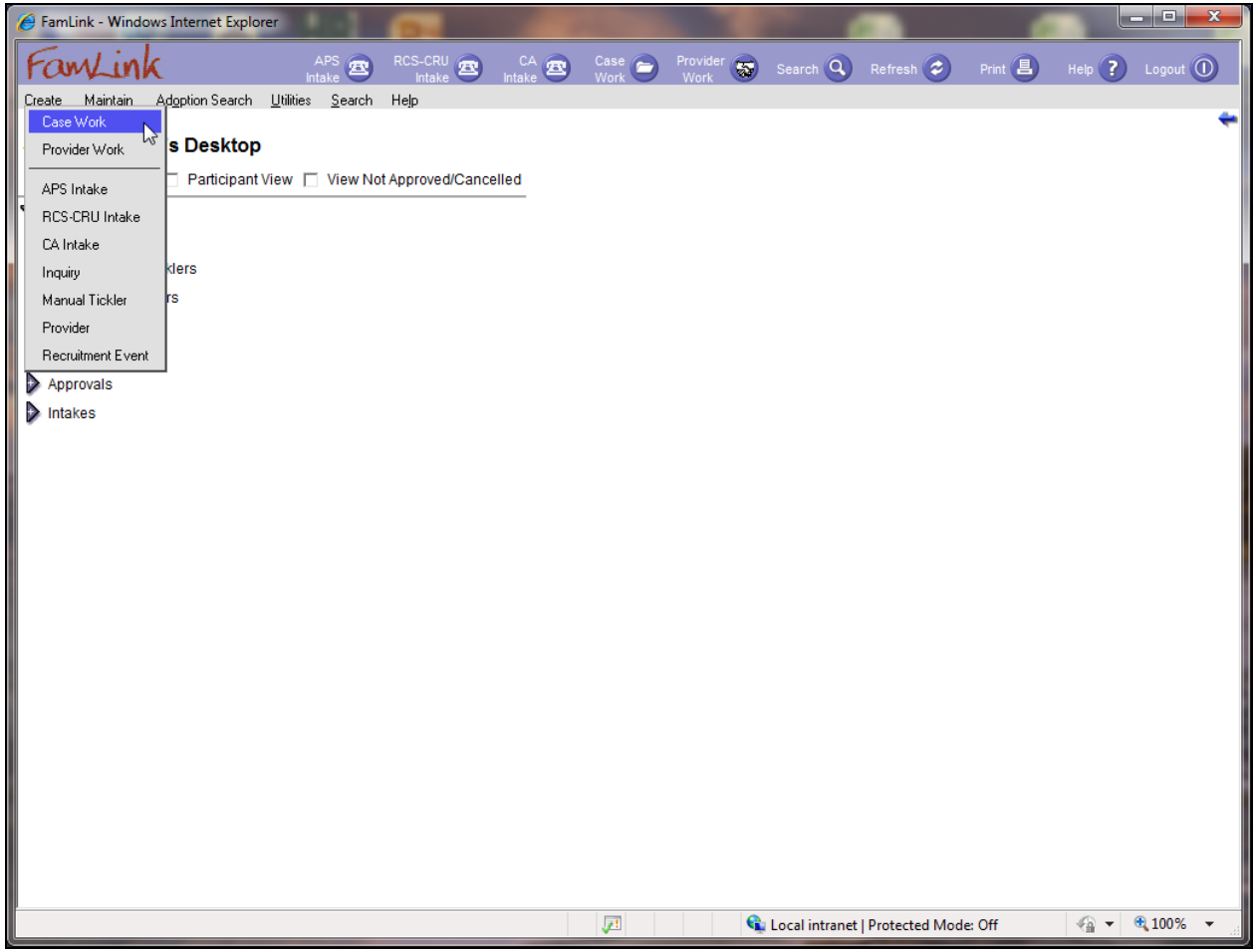
Topic: Case Notes



This is the FamLink Desktop, your starting point to create, edit, or view case notes. You open the **Case Notes** page as follows:

If you have a case assignment:

- On your Outliner, click the **Cases** expando, and click the **Actions** hyperlink for the desired case.
- Then, select the **Create Case Note** radio button, and click **Continue** to open the **Case Notes** page.

-or -

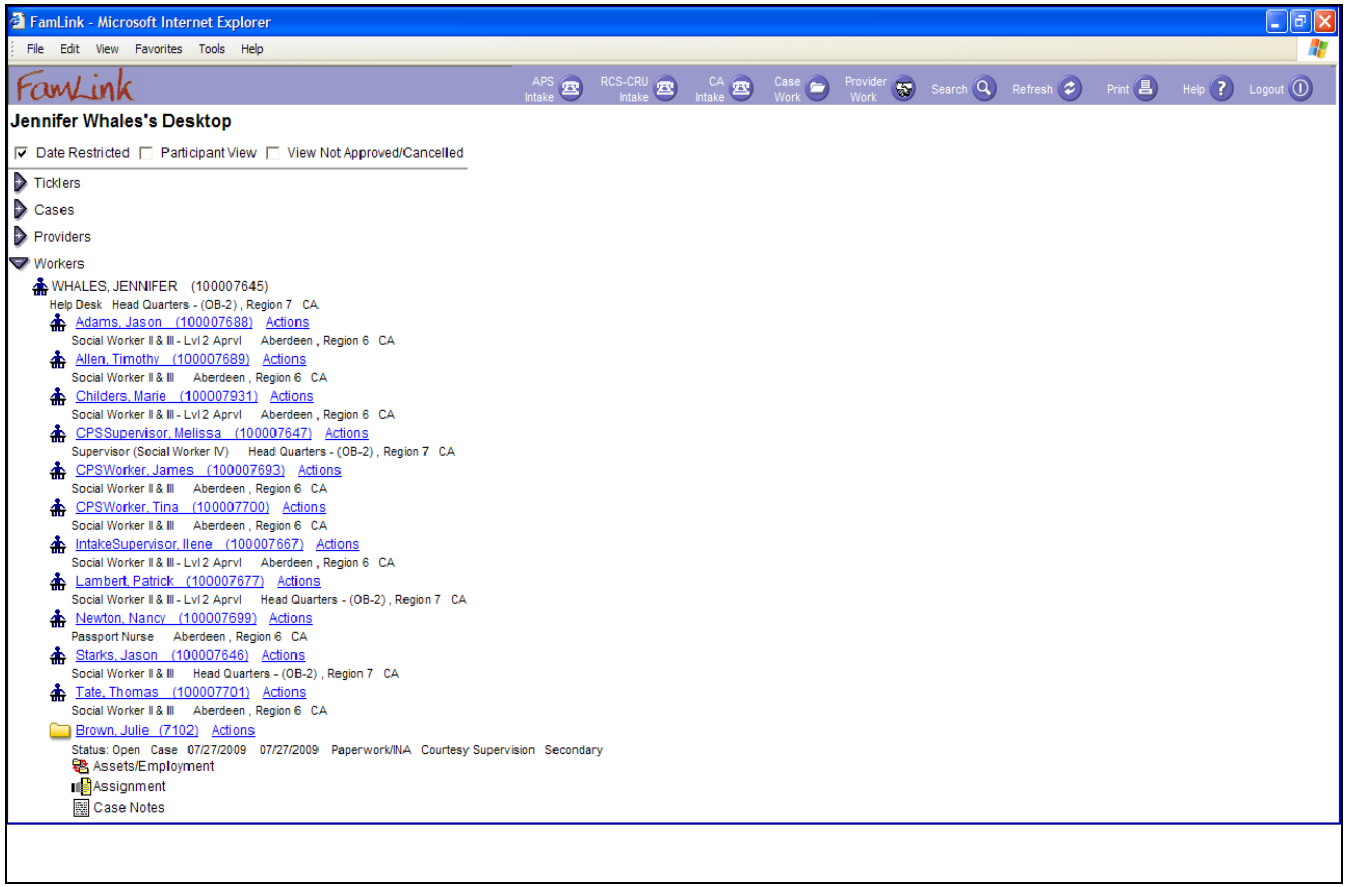
- From the Desktop, on the **Create** menu, click **Case Work**. Click the **Case Notes** list, and select a case type, such as ***CPS*.**
- Select a **Case Name** and **Case Participant**. Click **Create** to open the **Case Notes** page.

If you do not have a case assignment:

- From the Desktop, click **Search** and search for the case name.
- In the **Cases Returned** group box, locate your case and click the case **Actions** hyperlink.
- Then, select the **Create Case Note** radio button, and click **Continue** to open the **Case Notes** page.

Course: FamLink Fundamentals

Topic: Case Notes


FamLink - Microsoft Internet Explorer
File Edit View Favorites Tools Help
FamLink
APS Intake
RCS-CRU Intake
CA Intake
Case Work
Provider Work
Search
Refresh
Print
Help
Logout
Jennifer Whales's Desktop
Date Restricted
Participant View
View Not Approved/Cancelled
Ticklers
Cases
Providers
Workers
WHALES, JENNIFER (100007645)
Help Desk Head Quarters - (OB-2) , Region 7 CA
Adams, Jason (100007688) Actions
Social Worker II & III - Lvl 2 Aprvl Aberdeen , Region 6 CA
Allen, Timothy (100007689) Actions
Social Worker II & III Aberdeen , Region 6 CA
Childers, Marie (100007931) Actions
Social Worker II & III - Lvl 2 Aprvl Aberdeen , Region 6 CA
CPSSupervisor, Melissa (100007647) Actions
Supervisor (Social Worker IV) Head Quarters - (OB-2) , Region 7 CA
CPSWorker, James (100007693) Actions
Social Worker II & III Aberdeen , Region 6 CA
CPSWorker, Tina (100007700) Actions
Social Worker II & III Aberdeen , Region 6 CA
IntakeSupervisor, Ilene (100007667) Actions
Social Worker II & III - Lvl 2 Aprvl Aberdeen , Region 6 CA
Lambert, Patrick (100007677) Actions
Social Worker II & III - Lvl 2 Aprvl Head Quarters - (OB-2) , Region 7 CA
Newton, Nancy (100007699) Actions
Passport Nurse Aberdeen , Region 6 CA
Starks, Jason (100007646) Actions
Social Worker II & III Head Quarters - (OB-2) , Region 7 CA
Tate, Thomas (100007701) Actions
Social Worker II & III Aberdeen , Region 6 CA
Brown, Julie (7102) Actions
Status: Open Case 07/27/2009 07/27/2009 Paperwork/INA Courtesy Supervision Secondary
Assets/Employment
Assignment
Case Notes

Desktop *cont'd*

If you are a supervisor:

- Supervisors can also access **Case Notes** by expanding a Worker icon on their desktop to see the Worker's assigned cases. Supervisors can then review or create case notes in the selected case by clicking on the **Actions** hyperlink next to a case and selecting the appropriate option on the **Actions** page.

Exception: You create an investigation case note from within an investigation.

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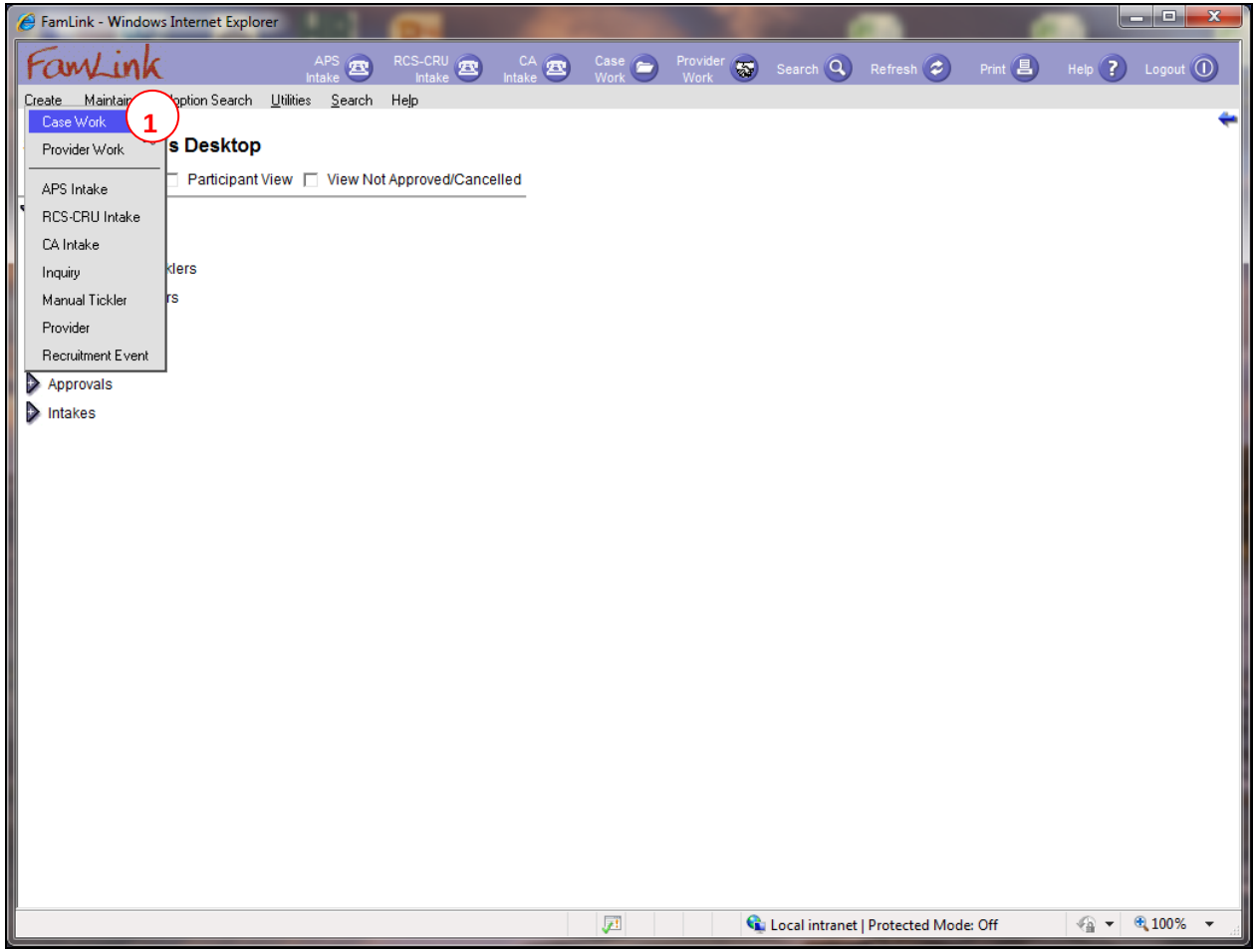
Topic: Case Notes



Desktop *cont'd*

In this example, we use the **Create Case Work** page to open the **Case Notes** page.

(1) On the **Create** menu, click **Case Work**.

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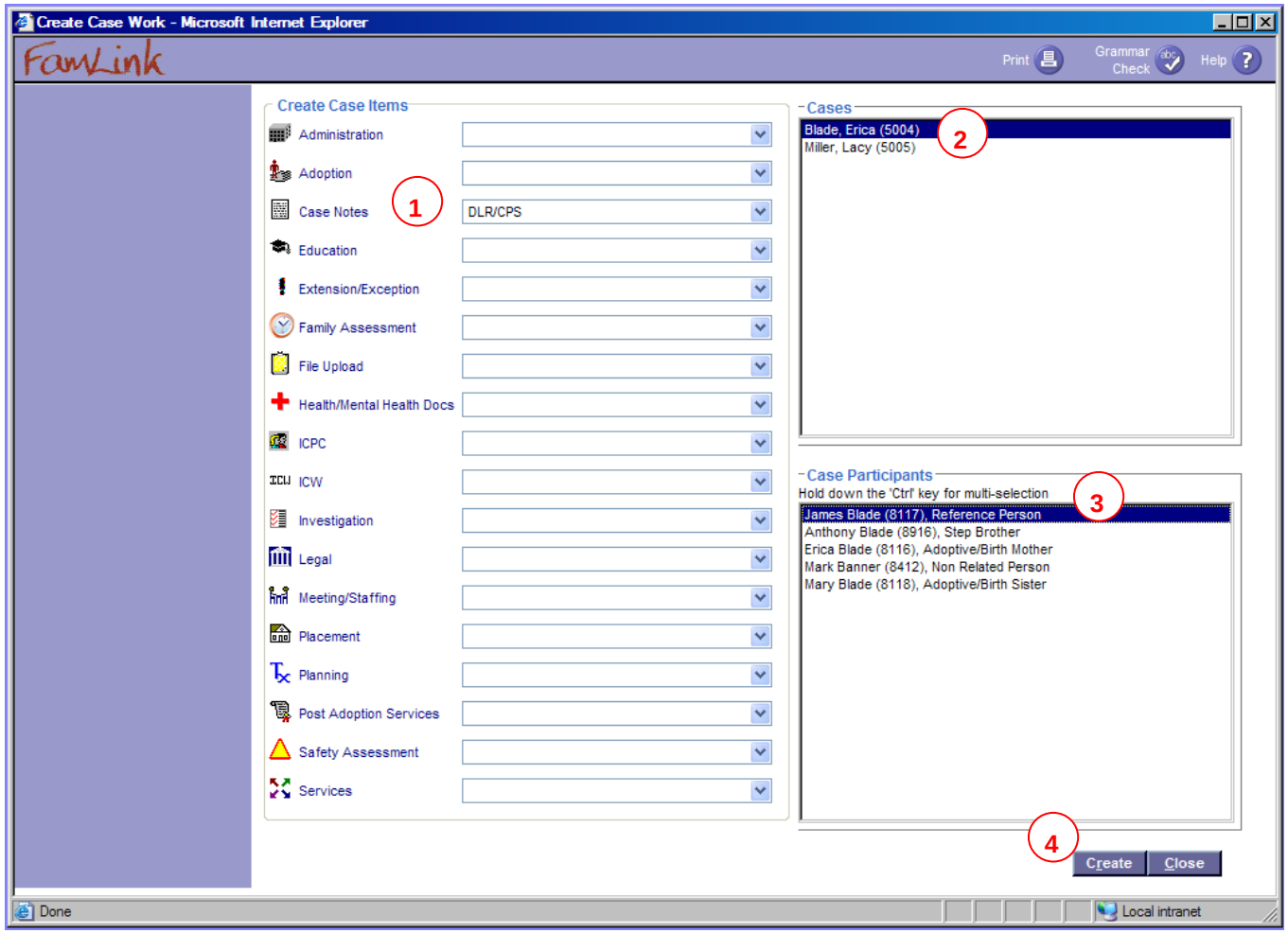
Topic: Case Notes



The **Create Case Work** page displays.

(1) In the **Create Case Items** group box, click the **Case Notes** list, and select a type.

(2) Select a case from the **Cases** group box.

(3) Select participants from the **Case Participants** group box**.**

(4) Click **Create** to open the **Case Notes** page.

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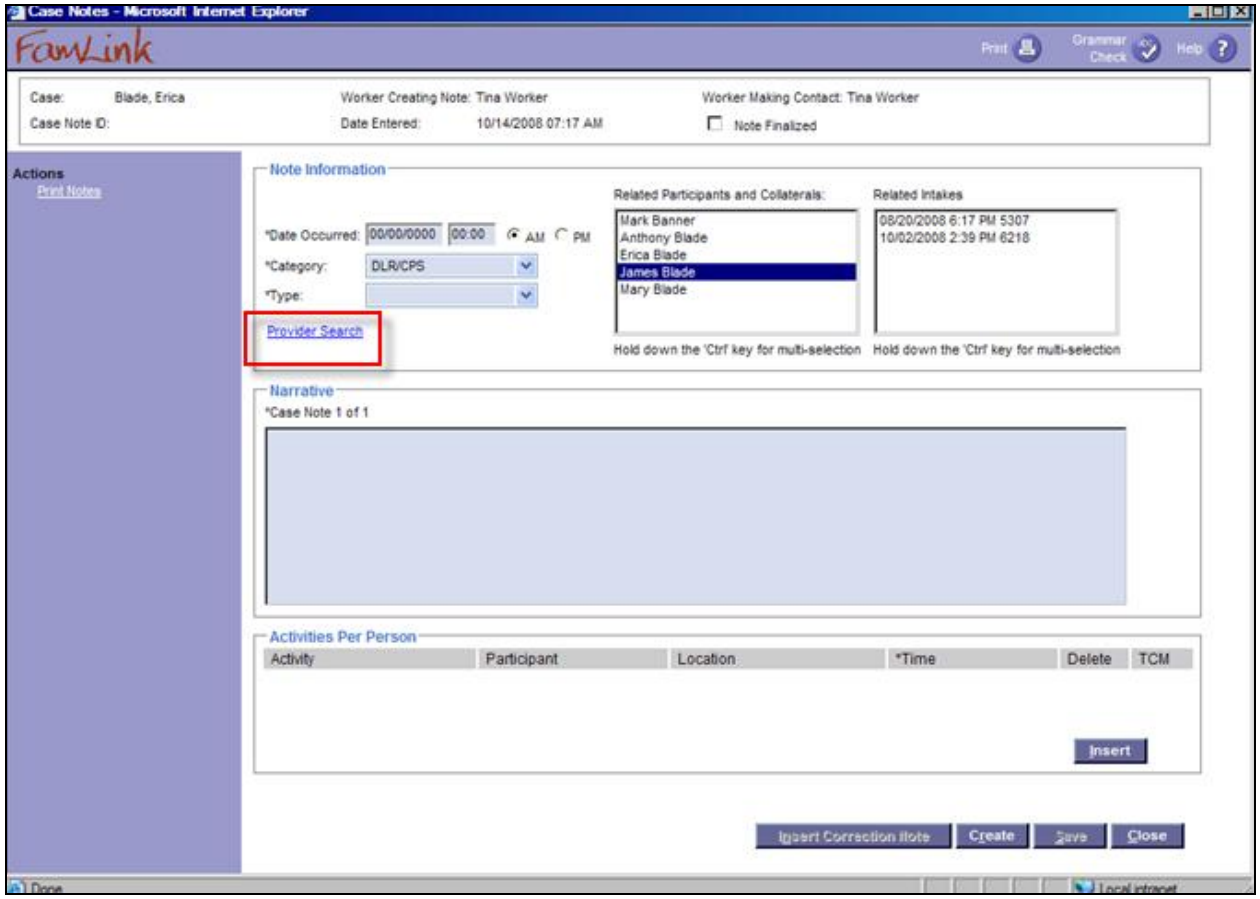
Topic: Case Notes



The **Case Notes** page displays.

Use this page to enter narrative about a case and its activities. You can identify the note by **Category** and **Type.**

Let's look at the elements on this page.

FamLink pre-fills most of the information that displays in the case header group box at the top of the page. The header includes **Case, Worker Creating Note**, **Worker Making Contact**, **Case Note ID**, **Date Entered**, and **Note Finalized**.

- **Worker Making Contact** defaults to the name of the worker creating the note.
- FamLink will pre-fill **Case Note ID** after you save the case note.
- You select the **Note Finalized** check box when you have made all entries to the note. FamLInk will freeze the note from further edits.
- **Provider Search** hyperlink is only visible when you have selected DLR/CPS in the Category field.(see page 12 of this document for instructions)

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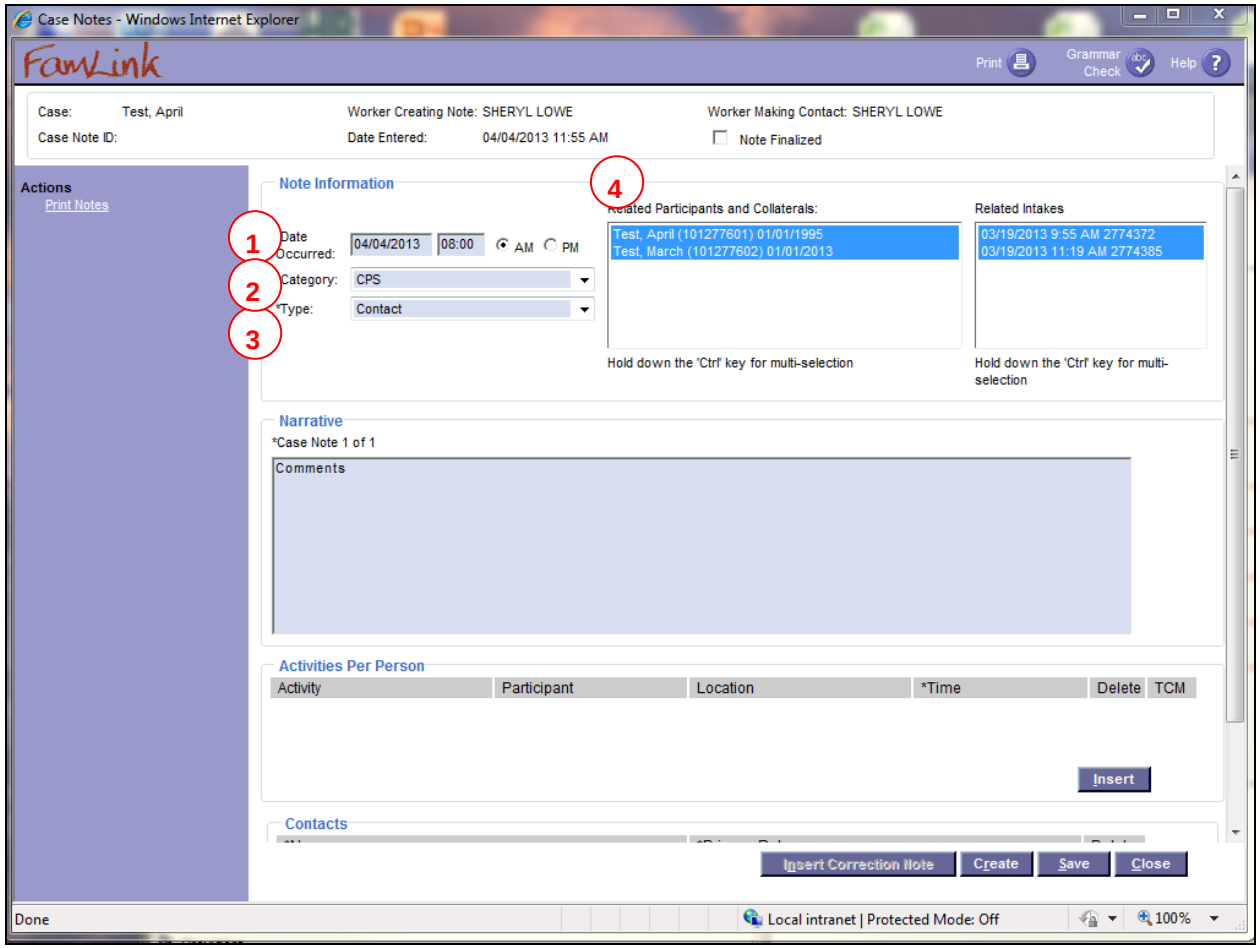
Topic: Case Notes



Case Notes page *cont'd*

The **Note Information** group box identifies the type of case note and the case participants.

(1) In the **Date Occurred** date and time boxes, type the date and time the activity occurred. You can also right-click the date box to display a calendar. Click the date you want. This is required information.

(2) The **Category** list pre-fills from the **Create Case Work** page selection.

- If you used the **Actions** hyperlink on the Outliner to get to this page, this selection defaults to a blank value. You must select the category.

(3) Click the **Type** list, and select a value.

- The category you selected determines the choices on this list.

(4) The **Related Participants and Collaterals** list displays all participants on the case.

- FamLink highlights the participants you identified on the **Create Case Work** page.
- Click a name to select an additional participant.
- To clear your selection, click the name again.
- For multiple selections, hold down **CTRL** on the keyboard and click.

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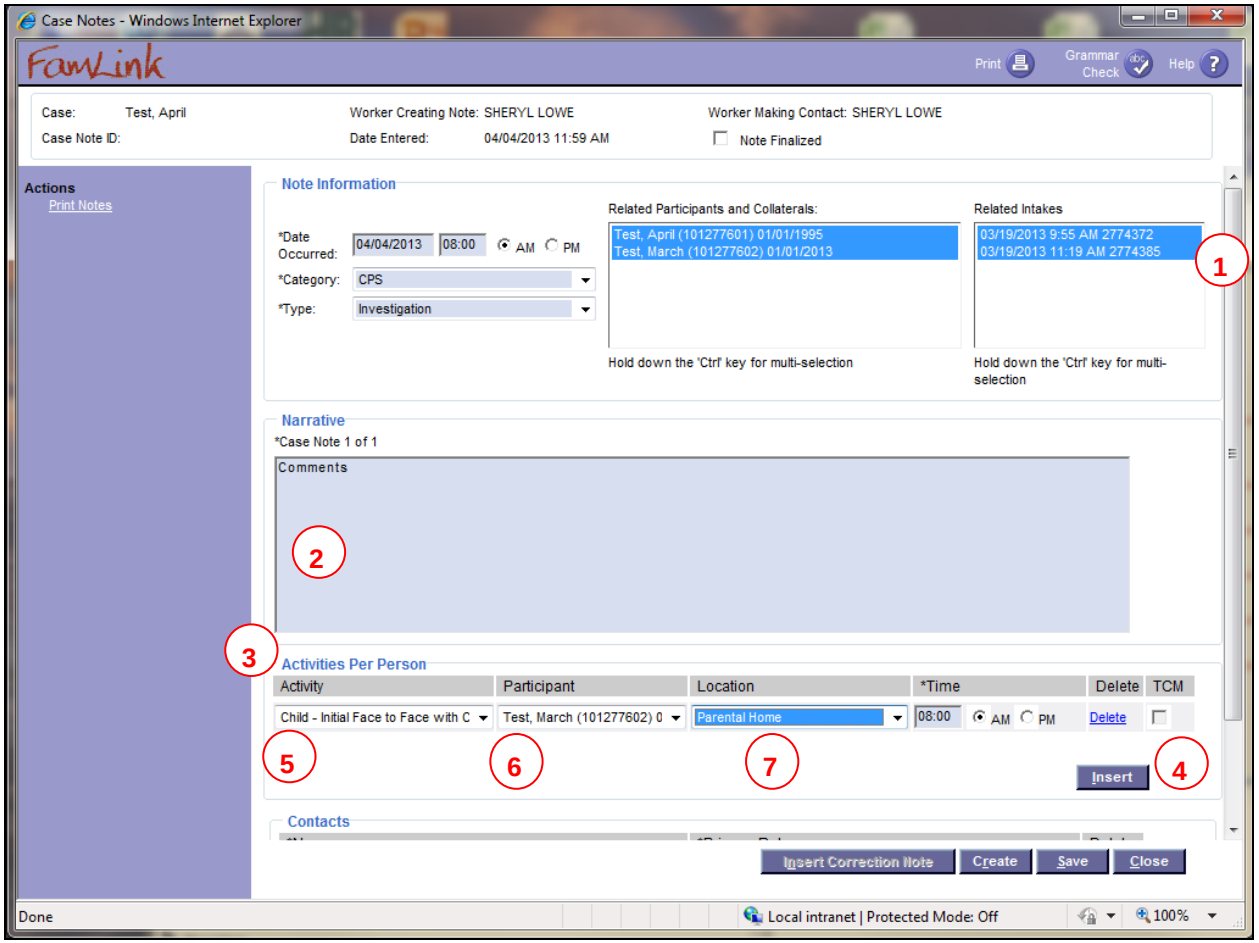
Topic: Case Notes



Case Notes page *cont'd*

(1) From the **Related Intakes** list, select the intake ID(s) related to this note.

- This is required information for an investigation case note.

(2) Click the **Narrative** text box, and type activity information. This text box has a limit of 10,000 characters.

In the **Activities Per Person** group box:

(3) No Activity is required if the Category selected is Fostering Well-Being.

(4) Click **Insert** to insert a blank row to record the activity.

(5) Click the list in the **Activity** column, and select an activity.

- The case note type you selected determines the available activities.

(6) Click the list in the **Participant** column, and select the name of the participant involved with this activity.

- Depending on the activity, you may or may not need to select a name.

(7) Click the list in the **Location** column, and select the location where the activity or event took place.

- Depending on the activity, you may or may not need to select a location.

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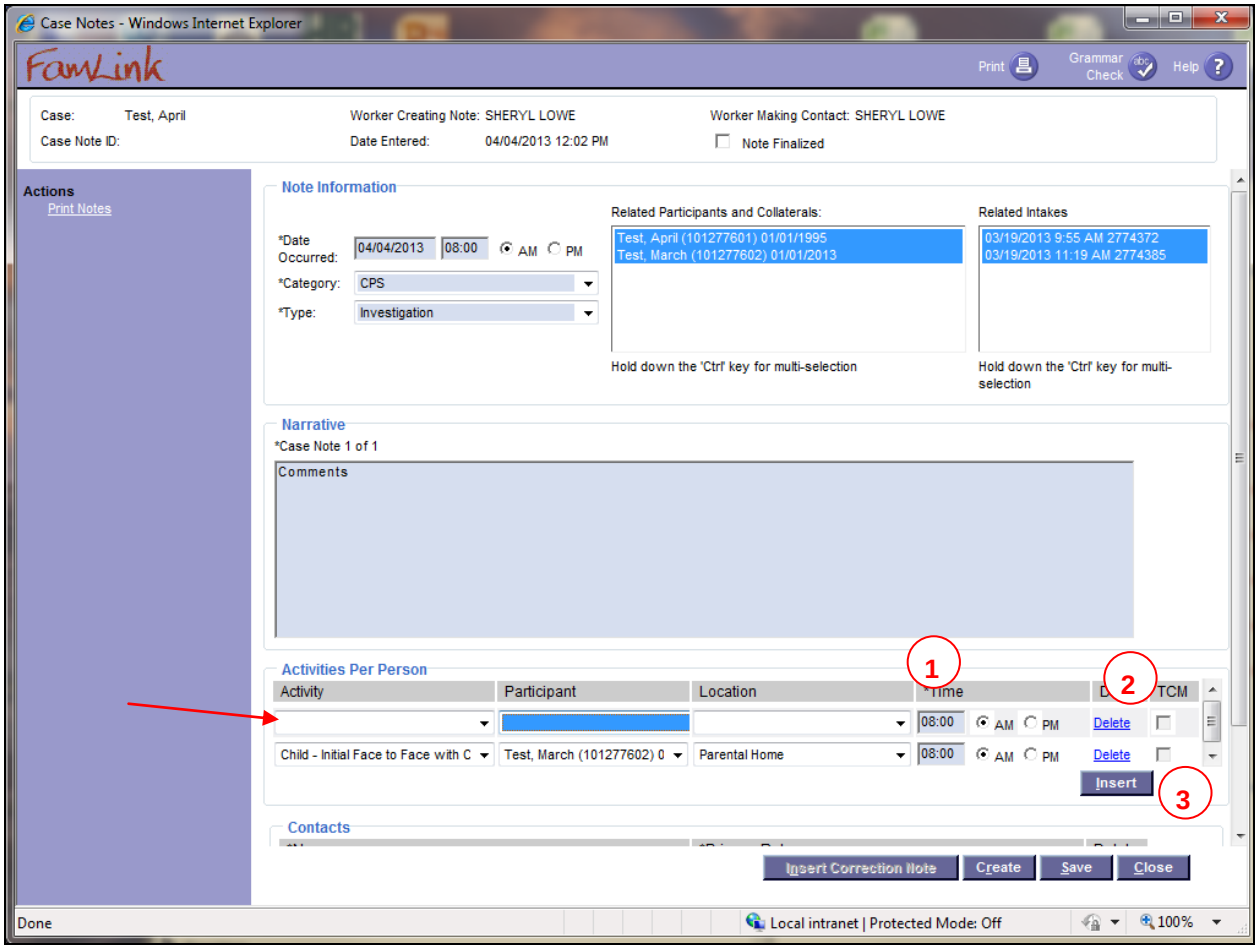
Topic: Case Notes



Case Notes page *cont'd*

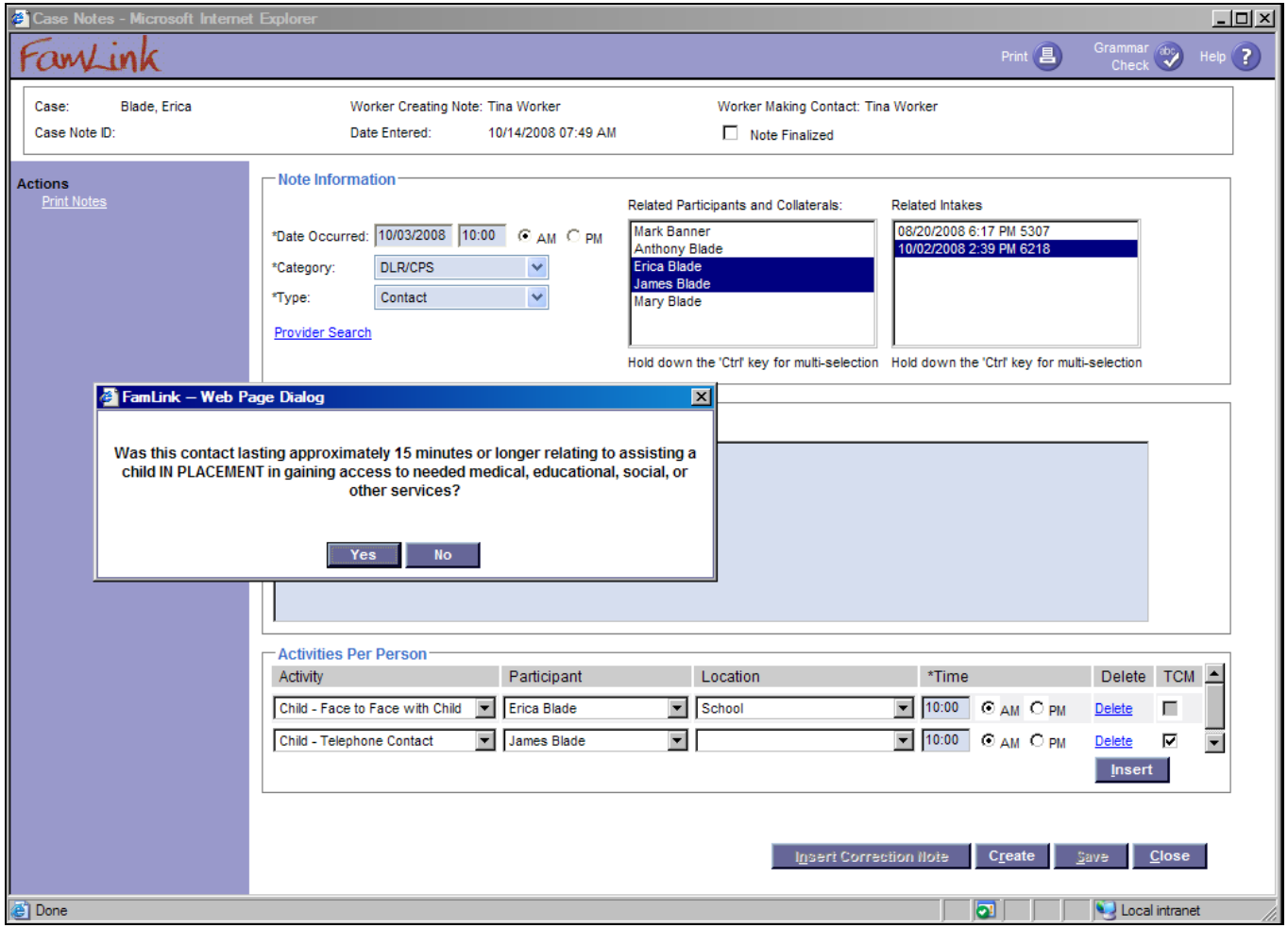
(1) The information in the **Time** column defaults to the entry in the **Note Information** group box. You can overwrite this information by typing the new date.

(2) If you want to remove a row of information, click the **Delete** hyperlink.

(3) If you need to report on another activity, click **Insert** to add a new row.

- You can add multiple activities, with different individuals, on the same note.

Tip: when you click Insert to insert multiple activities, the new blank row will be inserted at the top of the list.



Case Notes page *cont'd*

The check box in the **TCM** column records "Targeted Case Management" activity for open placements.

FamLink selects this box and it becomes unavailable if the case has an open placement and the activity is:

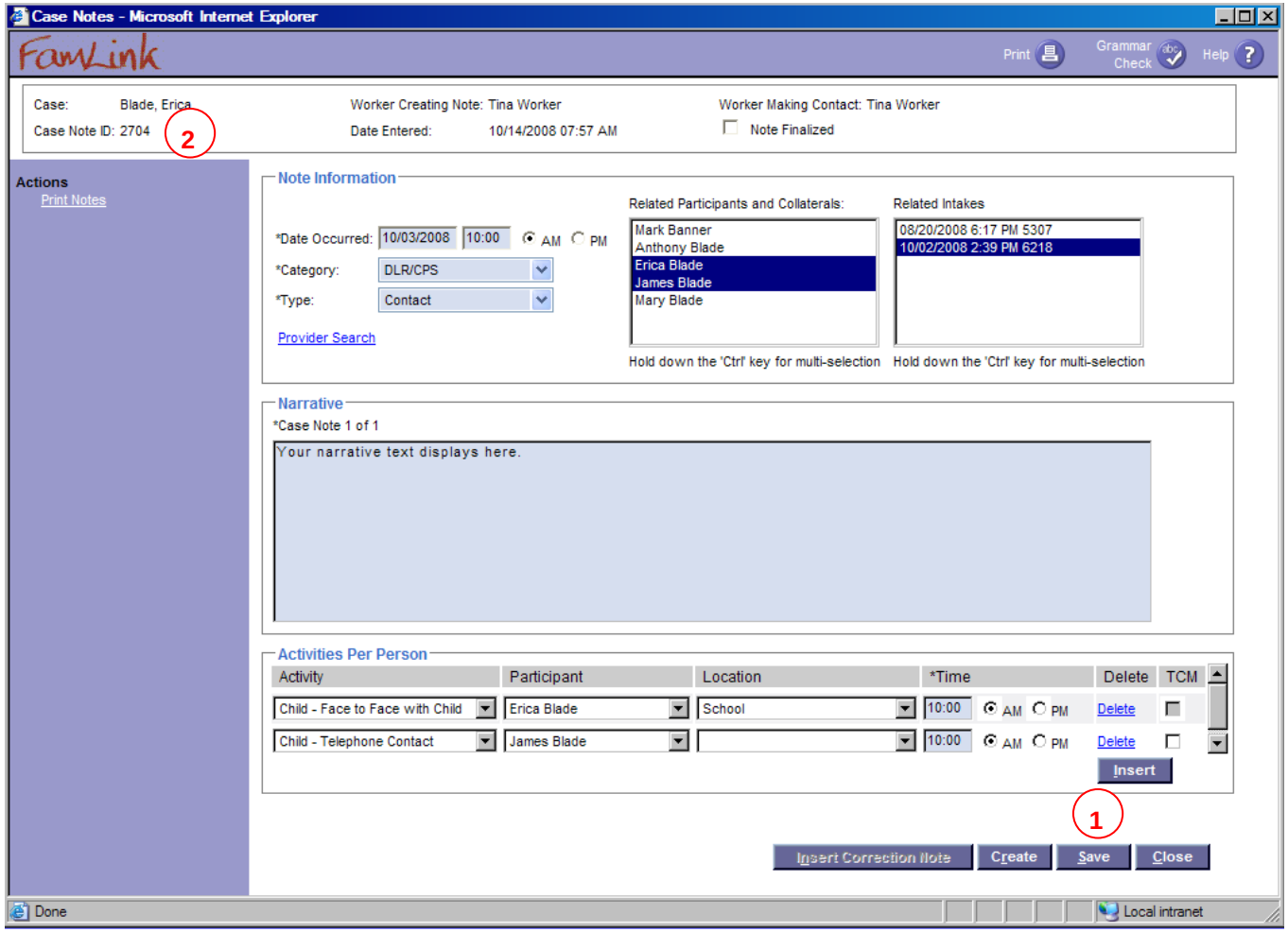
- *Child–Face-to-Face with Child*.
- *Health and Safety Monitoring Visit*.

If the case has an open placement and the activity is *Child–Telephone Contact*, FamLink selects the TCM check box and displays a message asking: "***Was this contact lasting approximately 15 minutes or longer relating to assisting a child IN PLACEMENT in gaining access to needed medical, educational, social, or other services?***"

- If you click ***Yes***, FamLink retains the check in the TCM check box.
- If you click ***No***, FamLink removes the check in the **TCM** check box.
- If you need to change your response, select the **TCM** check box and FamLink will present the question again.

Course: FamLink Fundamentals

Topic: Case Notes



Case Notes page *cont'd*

Using the **Command** buttons:

(1) When you have completed all entries for this case note, click **Save.**

(2) FamLink assigns the case note ID, which now displays in the **Case** header at the top of the page. The worker making contact can edit the case note for 30 days or until the person finalizes the note.

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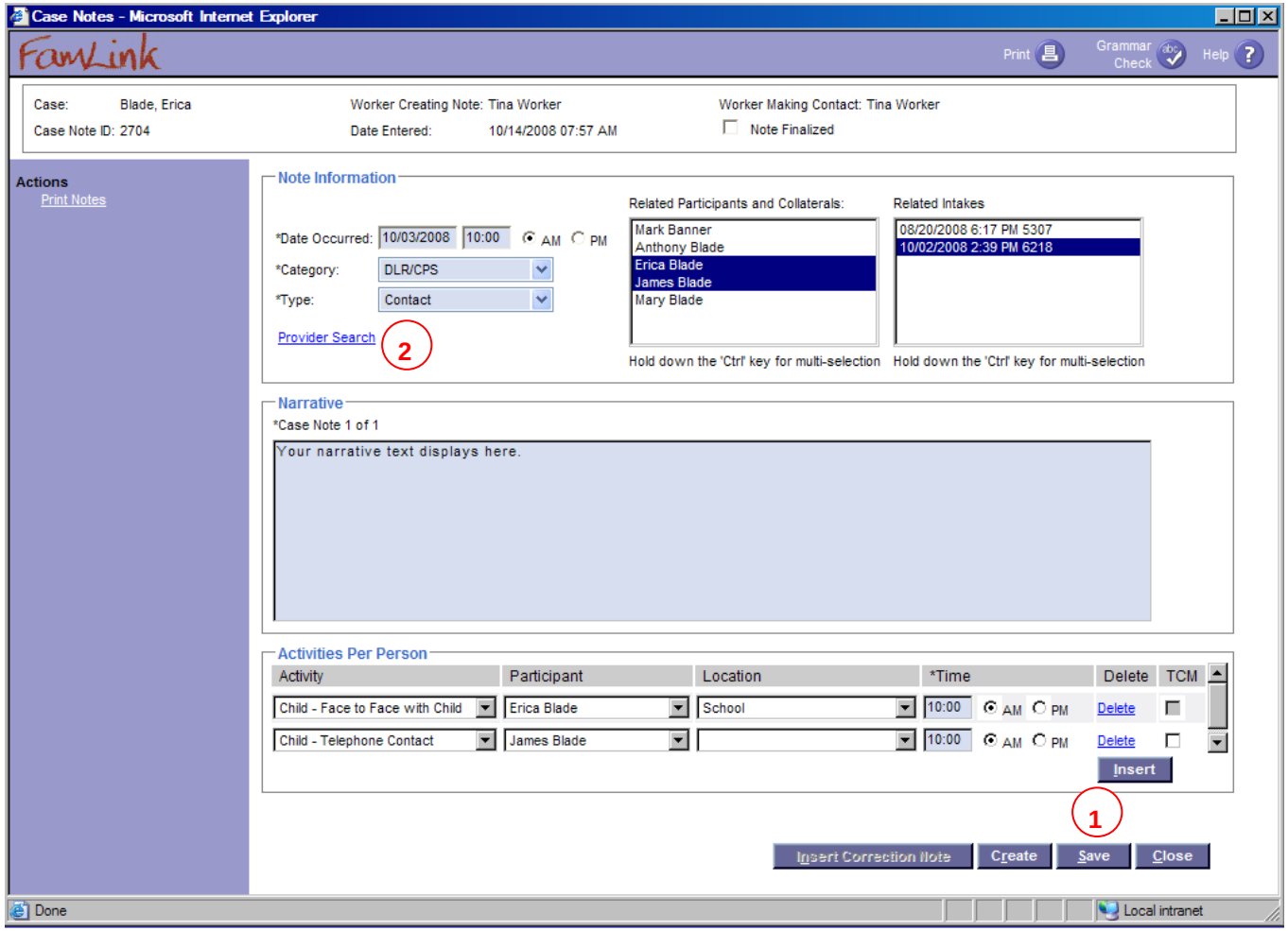
Topic: Case Notes



Case Notes page *cont'd*

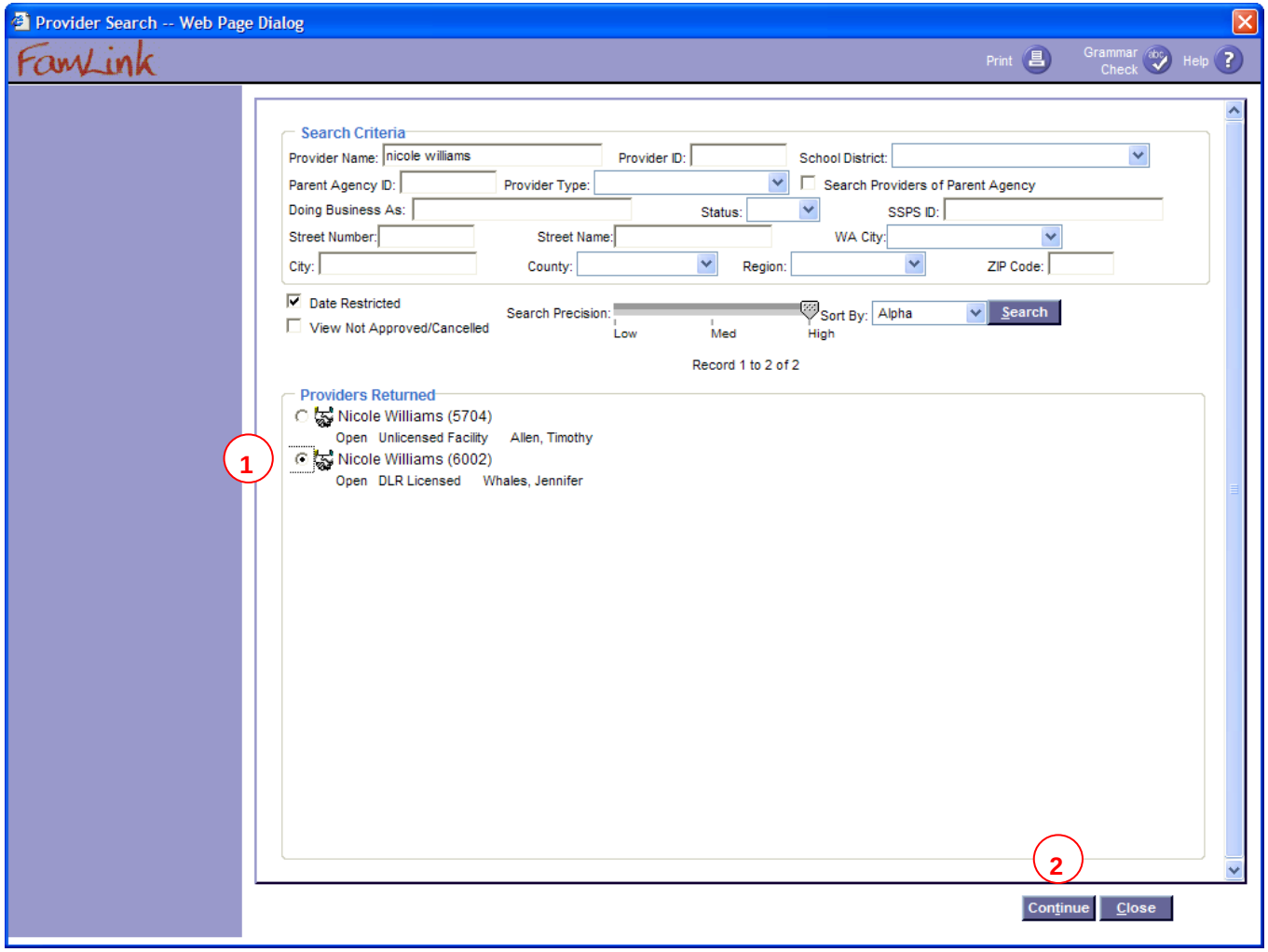
Case notes that have a **Category** of *DLR/CPS* can be associated to Provider notes after the Case Note is saved.

(1) Click on **Save**.

(2) Click on the **Provider Search** hyperlink.

Course: FamLink Fundamentals

Topic: Case Notes



Provider Search page displays

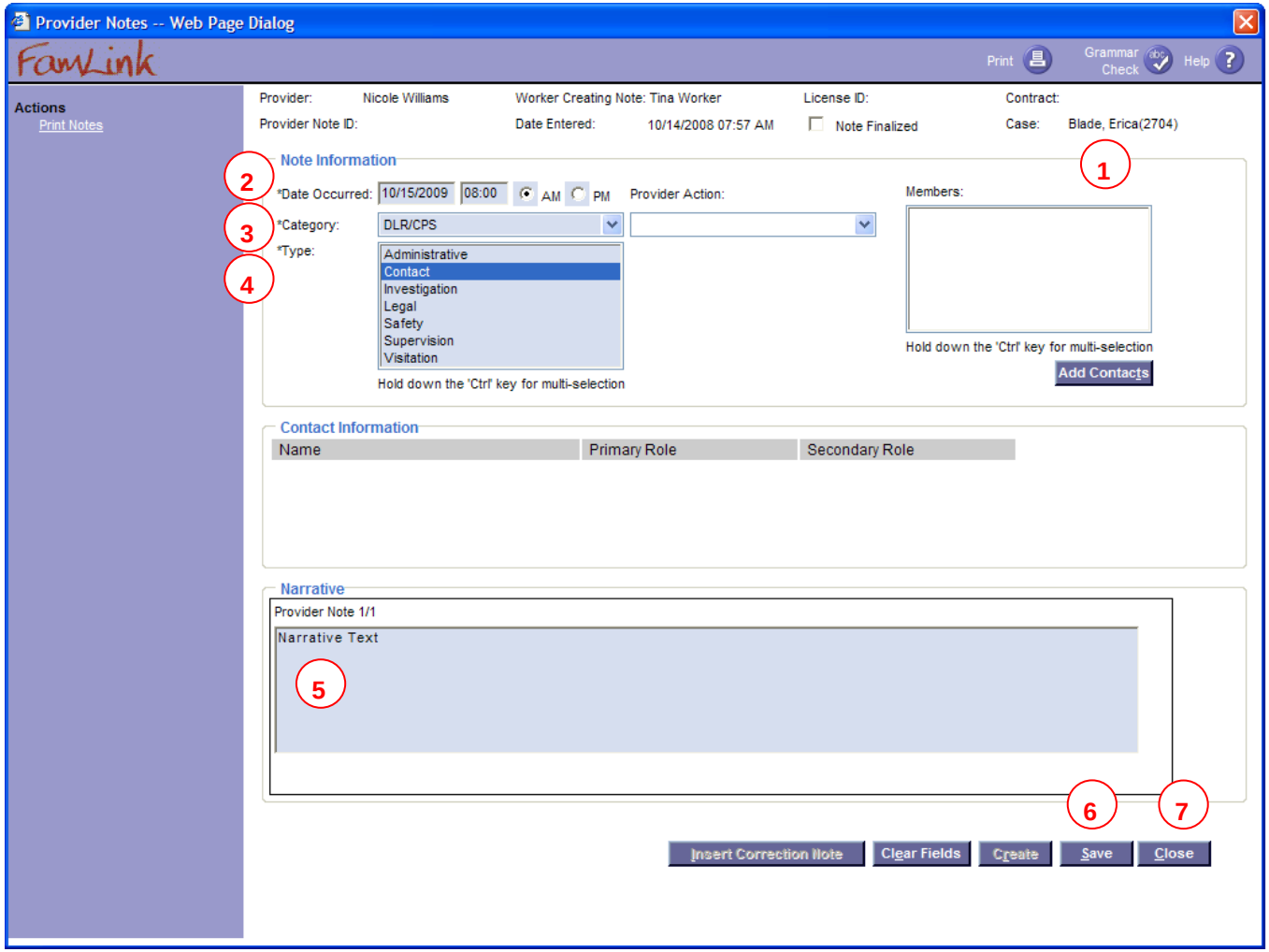
Search for the Provider whose Provider Note you want to associate with the Case Note.

(1) Select the radio button for the provider

(2) Click **Continue**.

Course: FamLink Fundamentals

Topic: Case Notes



Provider Notes page displays

FamLink pre-fills the following **Provider Notes** information from the **Case Notes** page:

(1) **Case Name** and **Case ID**

(2) **Date/Time Occurred**

(3) **Category**: *DLR/CPS*

(4) **Type**

(5) **Narrative**

(6) Click on the **Save**

(7) Click on **Close** to return to the **Case Note**.

You are returned to the Case Note.

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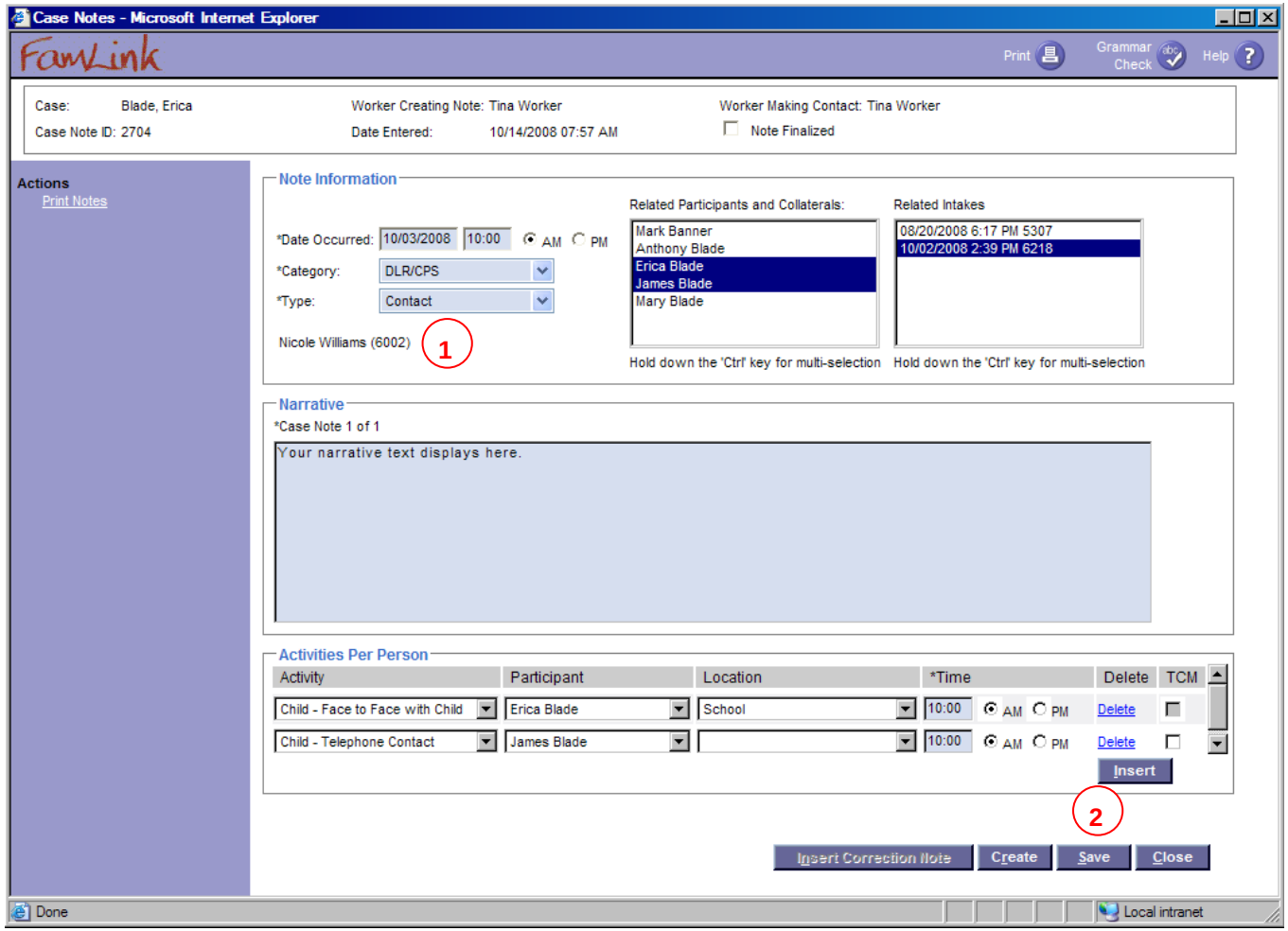
Topic: Case Notes



Case Notes page displays

(1) The Provider's Name and ID now appear.

(2) Click **Save**.

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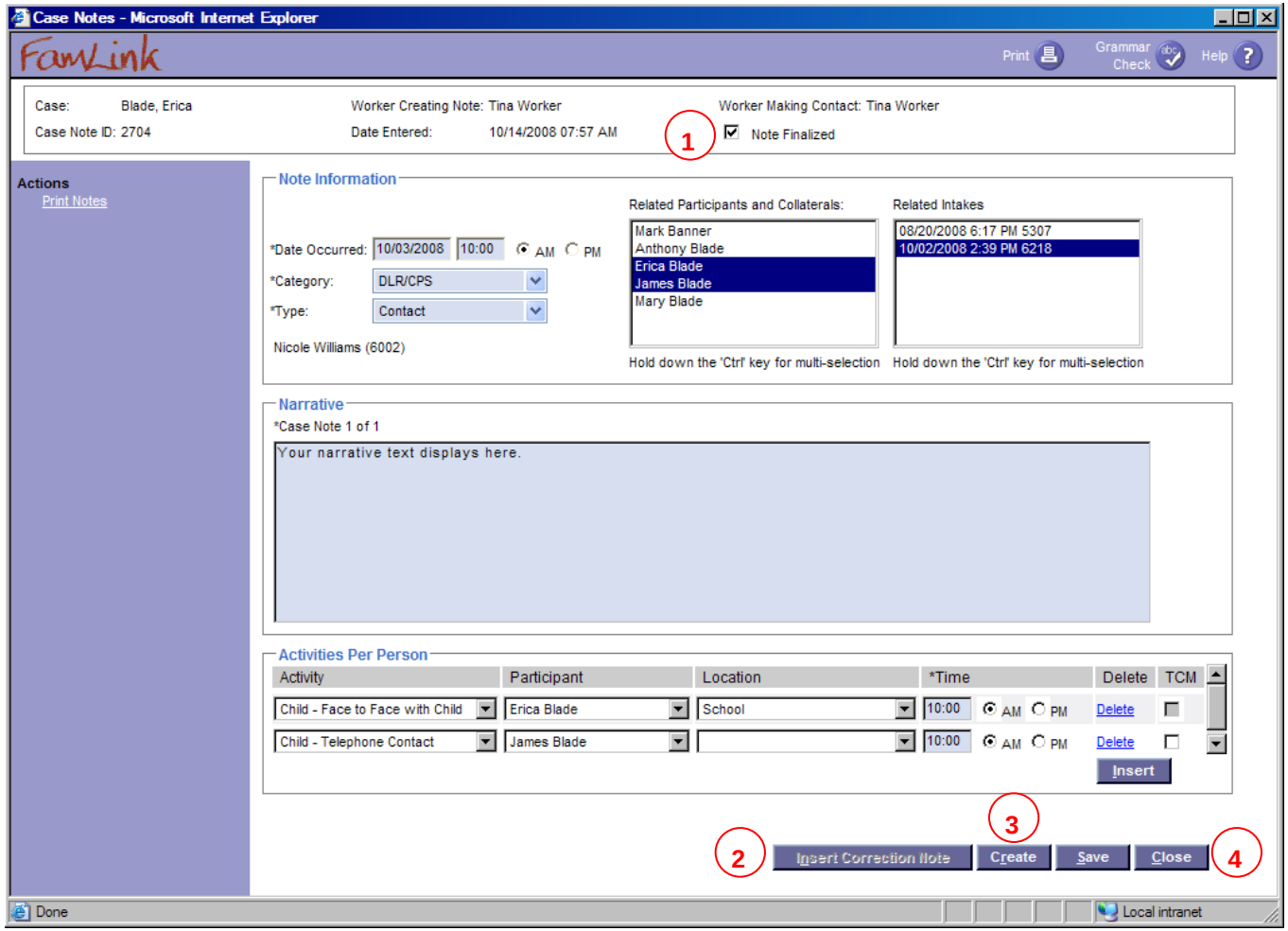
Topic: Case Notes



Case Notes page *cont'd*

(1) To finalize the case note, select the **Note Finalized** check box in the header.

- This freezes the note, and no one can edit the data. If you do not select the **Note Finalized** check box, FamLink automatically freezes the note after 30 days.

(2) If you need to make changes or corrections to a finalized note, click the **Insert Correction Note** button.

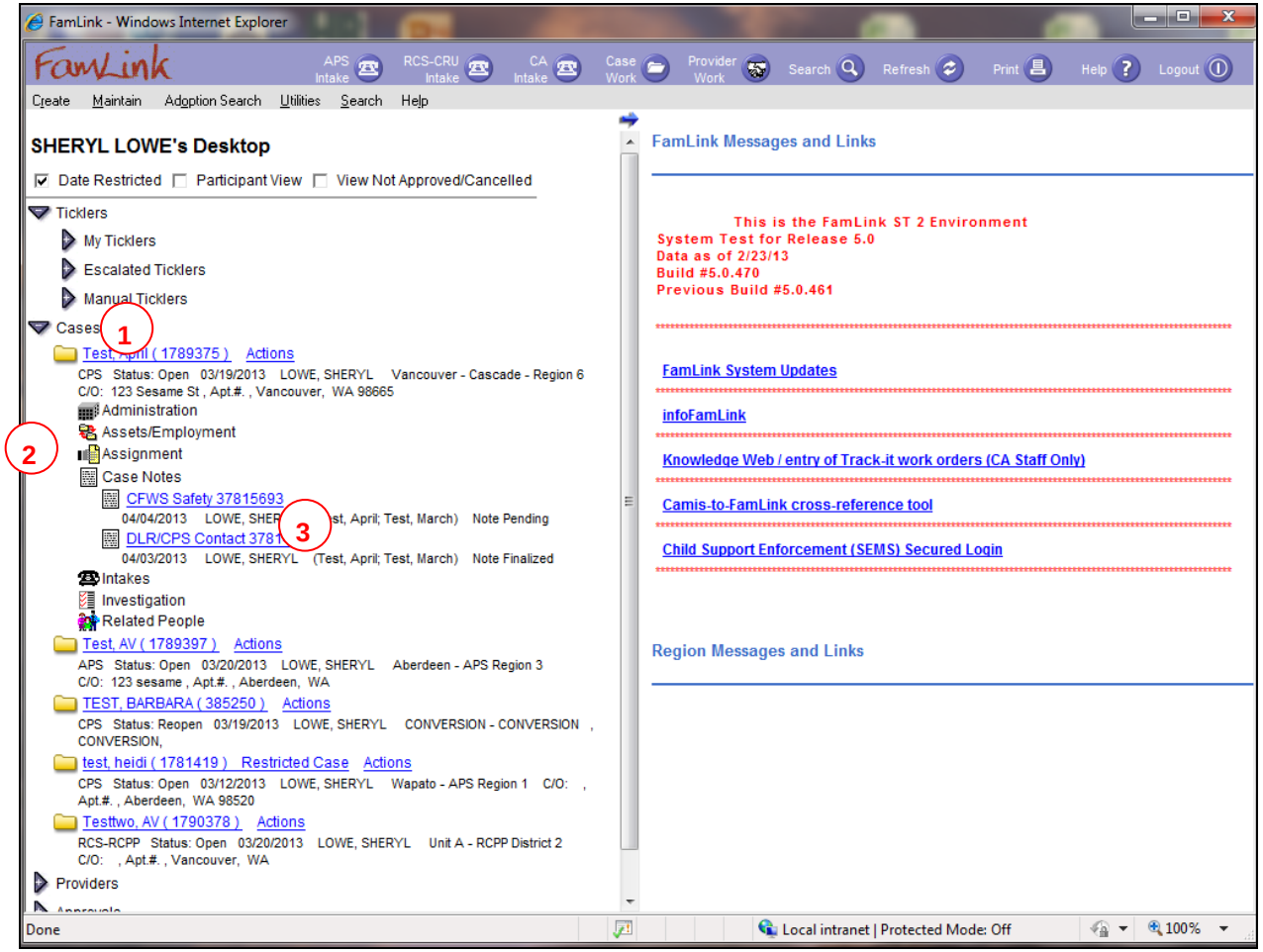
(3) If you want to enter a new note for the same case, click the **Create** button.

(4) To create a note for a different case, click **Close** to return to the Desktop.

- FamLink saves the existing note.
- A new blank note displays for the same case.

Course: FamLink Fundamentals

Topic: Case Notes



The FamLink Desktop displays.

This is the starting point to view a case note:

On the FamLink Desktop, most of your case notes display on your Outliner under the **Case Notes** icon, or under the icon for the case note's category.

- Notes created within the last three months display on the Outliner.
- To display case notes created prior to three months ago, clear the **Date Restricted** check box on the Outliner.

To view one note:

(1) Click the **Case Folder** icon.

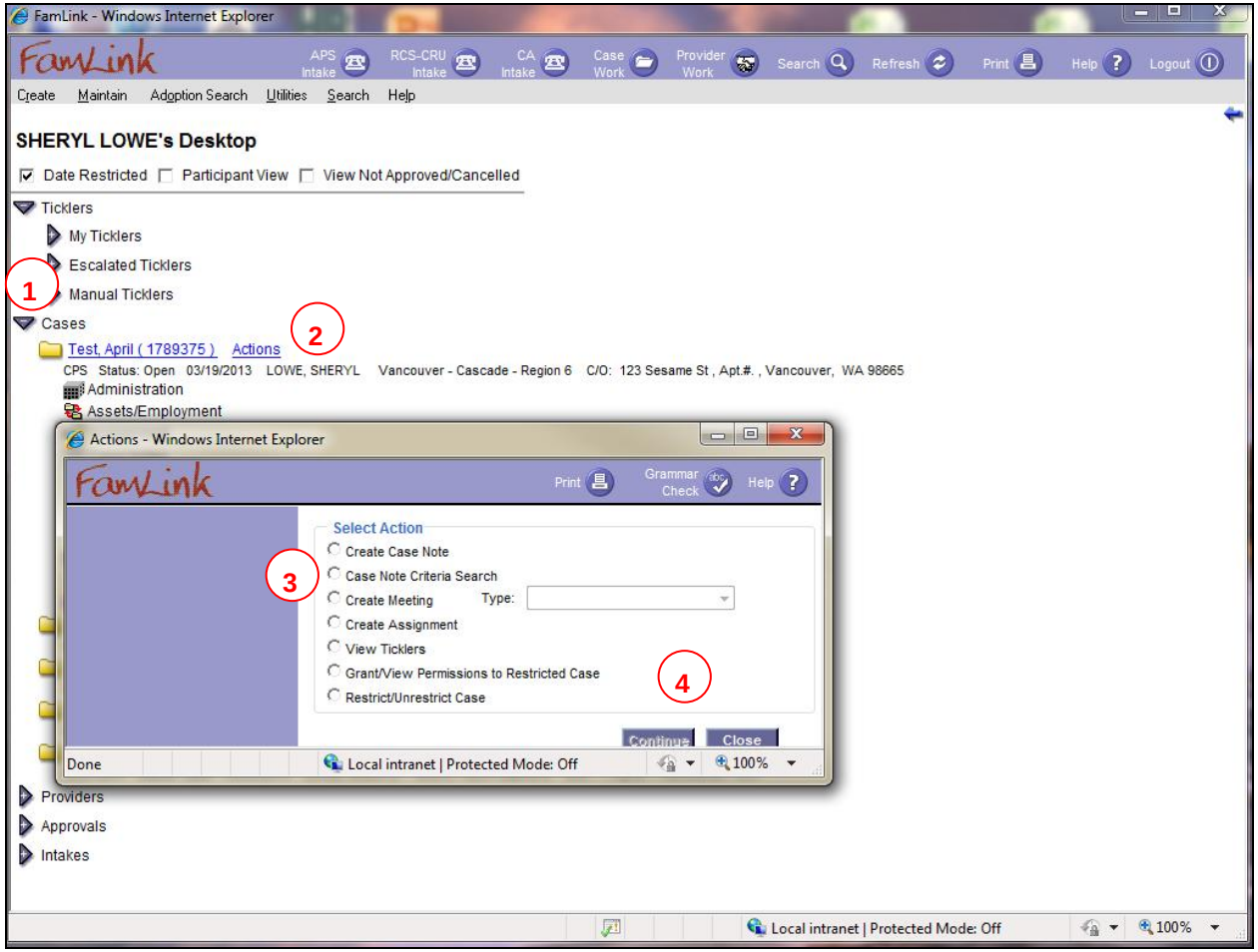
(2) Click the **Case Notes** icon.

(3) Click the hyperlink for the desired case note.

Note: Supervisors can also access **Case Notes** by expanding a Worker icon on their desktop to see the Worker's assigned cases, and then clicking on the **Actions** hyperlink next to a case and selecting the appropriate option on the **Actions** page.

Course: FamLink Fundamentals

Topic: Case Notes



The FamLink Outliner *cont'd*

View Multiple Case Notes

To view multiple notes, you must first create a list of the notes you want to see. This is done through a search.

To create your list:

(1) Click the **Cases** expando.

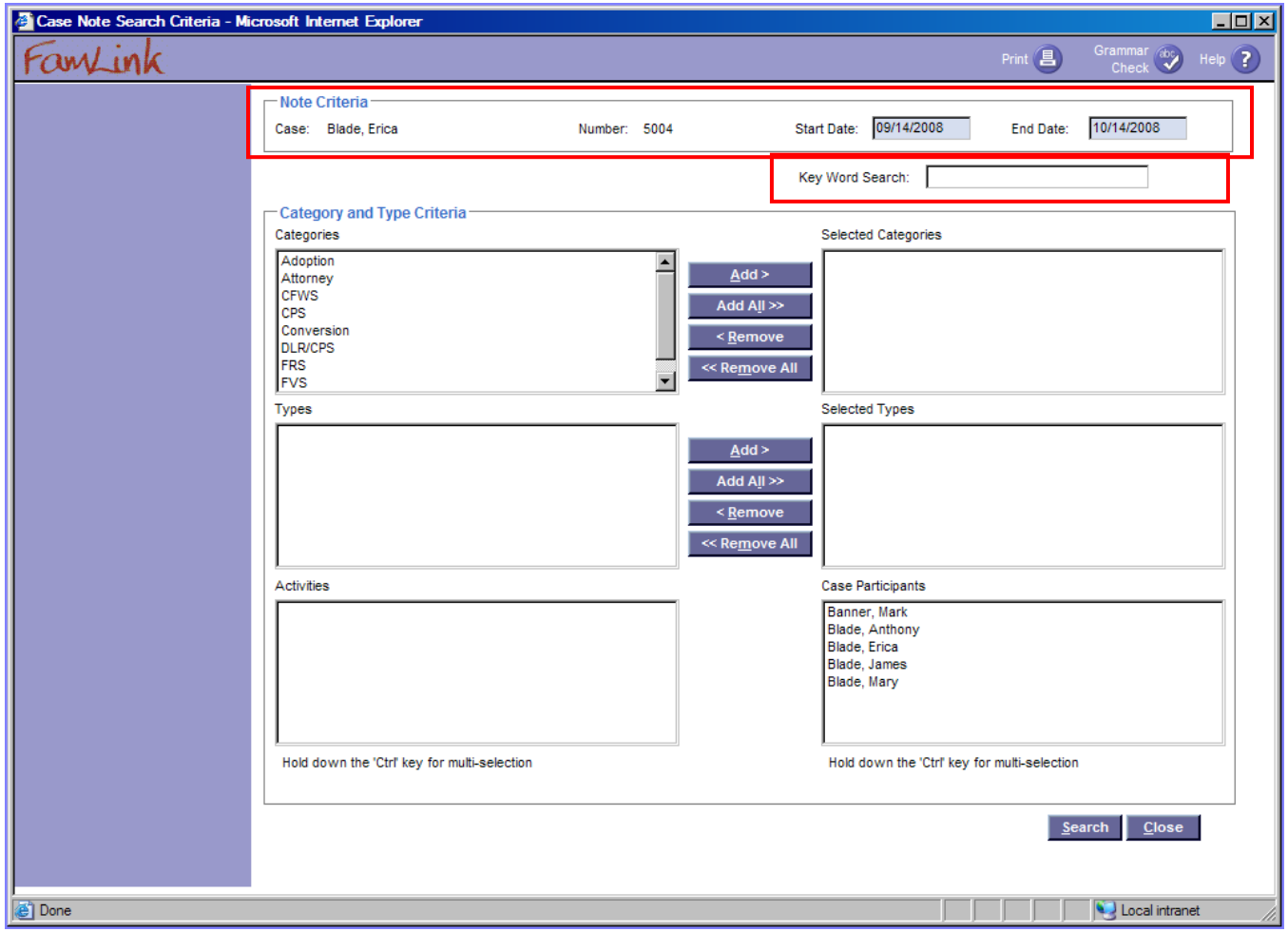
(2) Locate the desired case, and click its **Actions** hyperlink.

(3) Select the **Case Note Criteria Search** radio button.

(4) Click **Continue**.

Course: FamLink Fundamentals

Topic: Case Notes

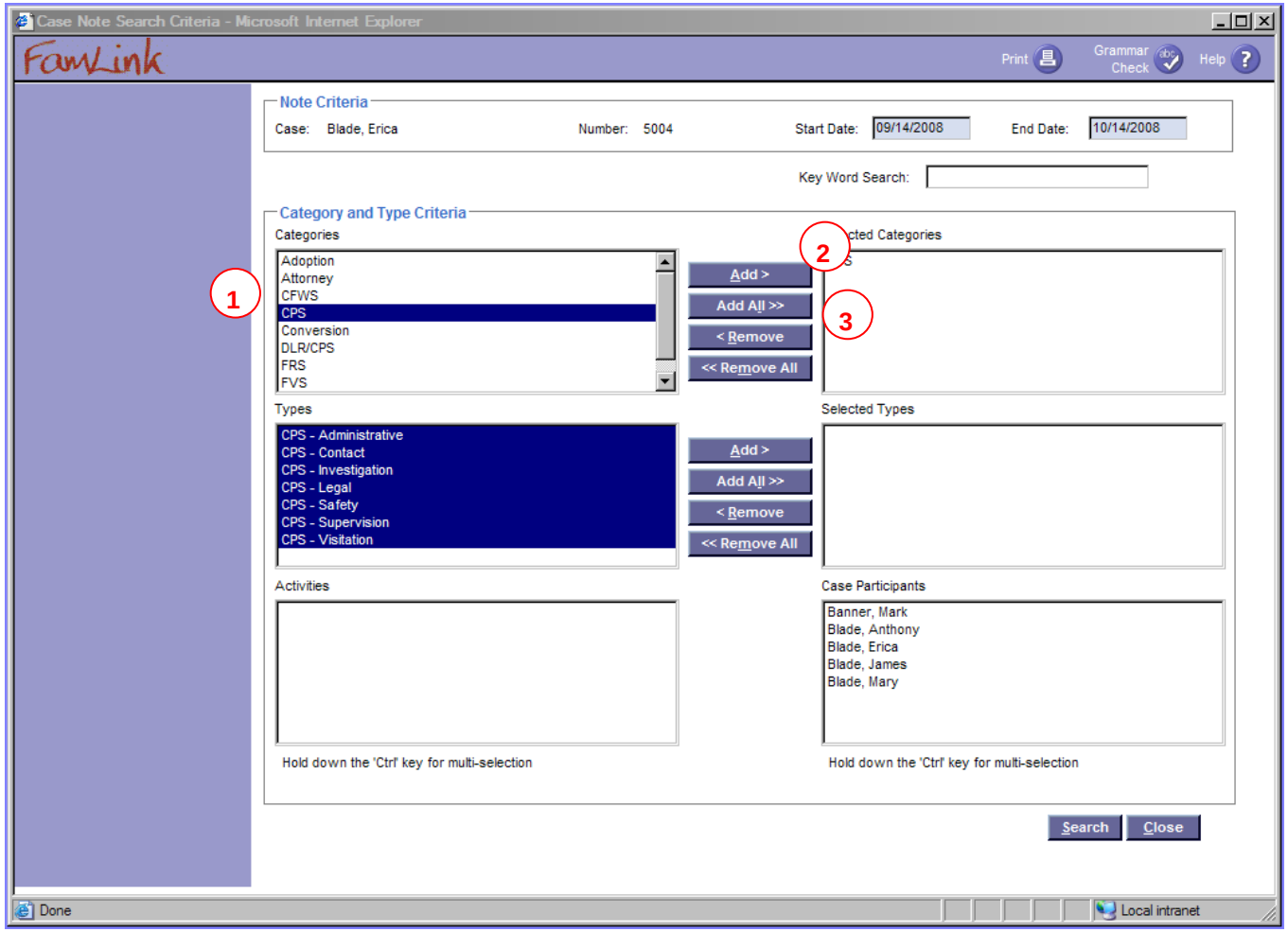


The **Case Note Search Criteria** page displays.

Use this page to identify the type of case note you wish to view.

The **Note Criteria** header group box identifies the name of the desired case.

- **Case** and **Numbe**r display for the case you selected.
- **Start Date** defaults to one month prior to today, and **End Date** defaults to today's date.
  - To change these dates, click the date boxes, and type the new dates.
- Use the **Key Words Search** text box to search the narrative portion of the case notes for an exact match on the characters entered.
  - Enter up to 20 characters.
  - Use with other search criteria.



Case Note Search Criteria page *cont'd*

Use the **Category and Type Criteria** group box to identify desired case notes.

(1) From the **Categories** list, select one or more items.

- Press the **CTRL** key on the keyboard, and click to make multiple selections.

(2) Click the **Add** button to move your selection to the **Selected Categories** list.

- FamLink pre-fills the **Types** list based on the category you selected.

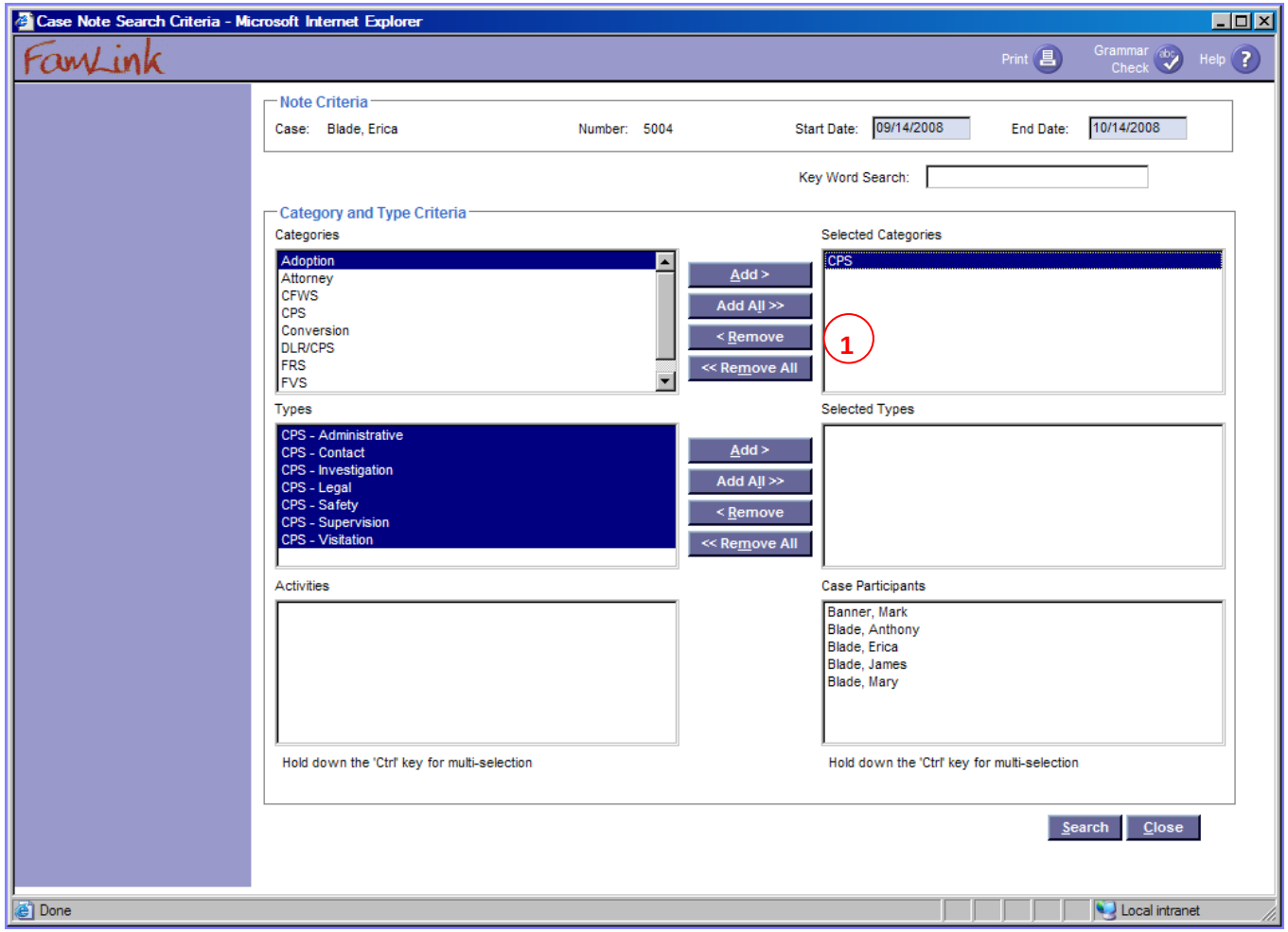
-or-

(3) Click the **Add All** button to move all of the items in the list to the **Selected Categories** list.

- FamLink pre-fills the **Types** list based on all of the categories.

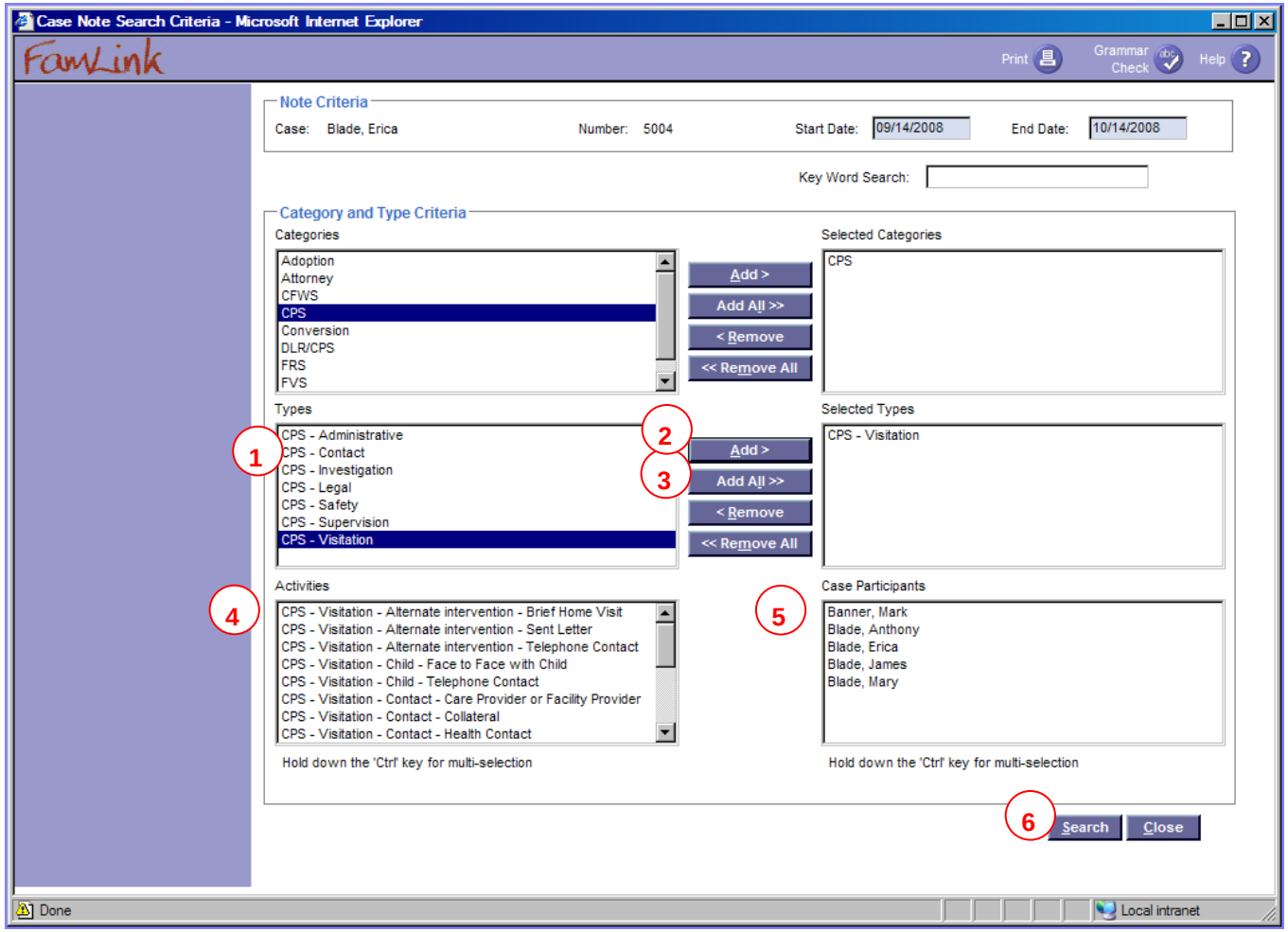
Course: FamLink Fundamentals

Topic: Case Notes



Case Note Search Criteria page *cont'd*

(1) Click the **Remove** button to delete one or more selections from the **Selected Categories** list, or click the **Remove All** button to delete all of the selections.



Case Note Search Criteria *cont'd*

(1) Click the **Type** list, and select one or more descriptions of the kind of note you wish to locate.

(2) Click the **Add** button to move your selections to the **Selected Types** list.

- Hold down the CTRL key, and click to make multiple selections

-or-

(3) Click **Add All** to add all items in the **Types** list to the **Selected Types** list.

(4) In the **Activities** list, select one or more descriptions of the kind of activity you wish to locate.

(5) The **Case Participants** group box contains a list of all participants.

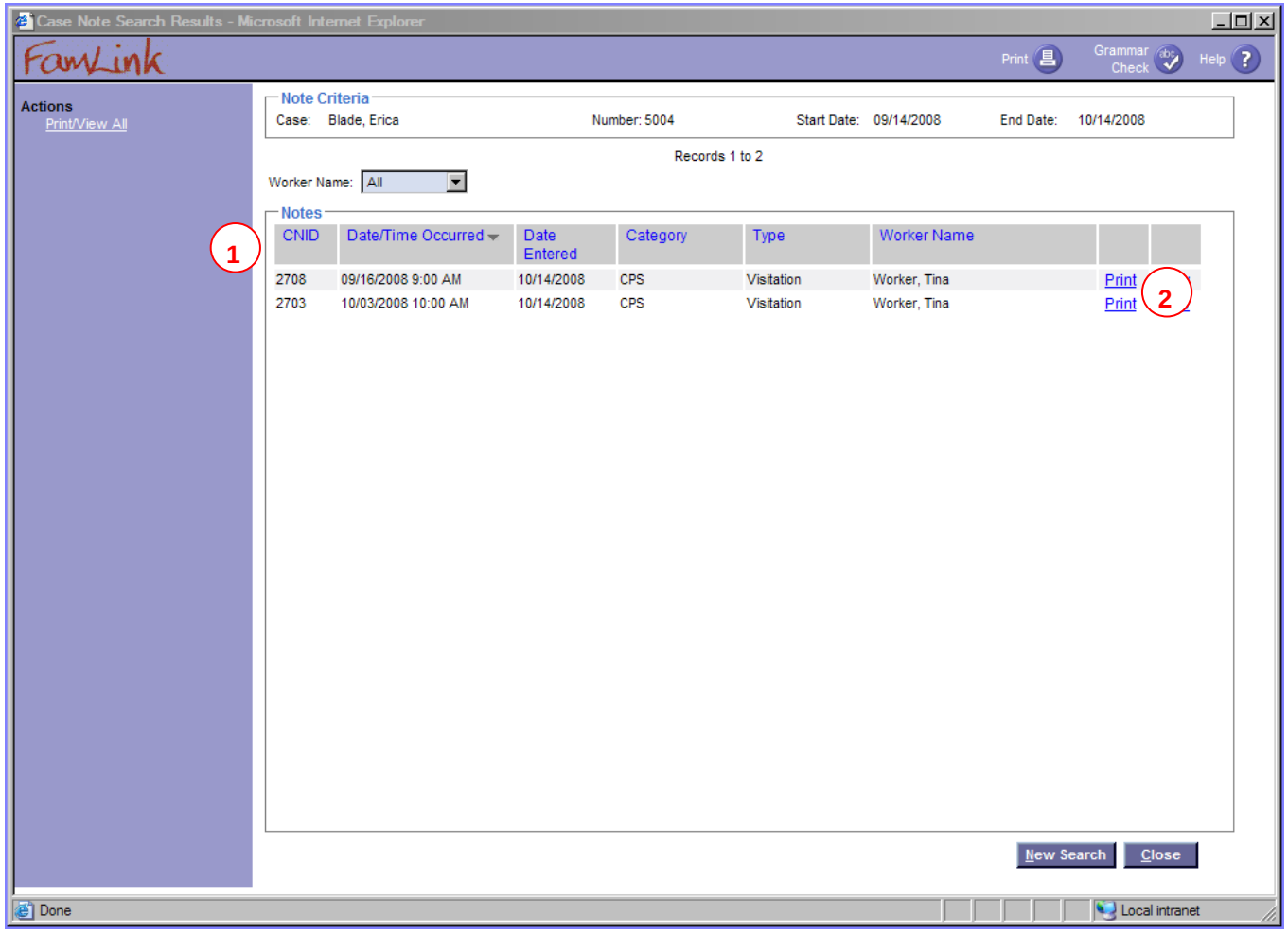
- Select one or more participants.
- If you do not select a participant, FamLink searches for all participants.

(6) Click **Search**.

The case note search starts, based on the selection criteria you entered.

Course: FamLink Fundamentals

Topic: Case Notes



The **Case Note Search Results** page displays.

The **Note Criteria** group box displays the case name, case number, and the date range that FamLink used for the search.

The **Worker Name** list contains the names of workers identified as *workers making contact* on the case note.

- To display notes for a particular worker, select that person's name from the list.

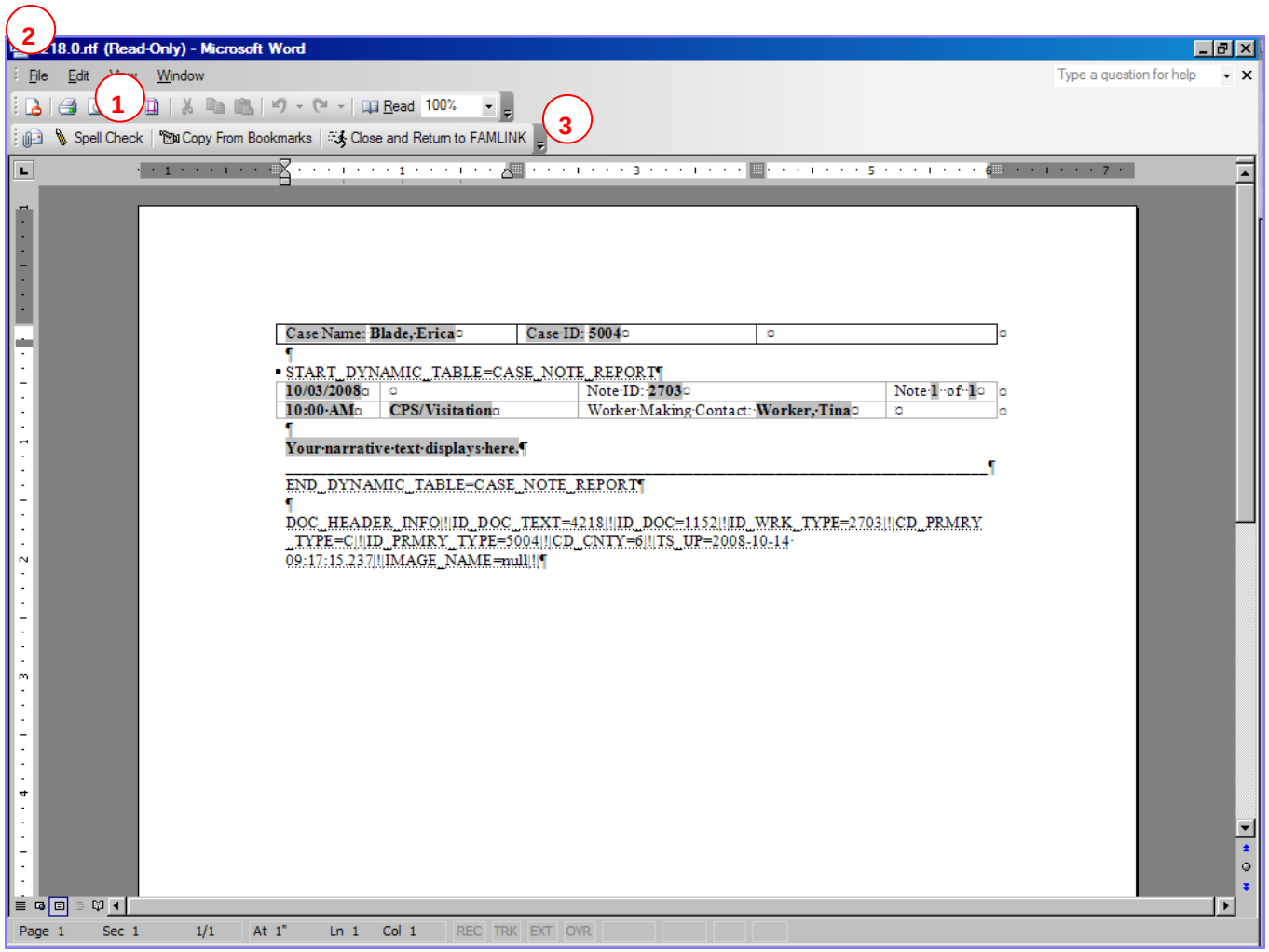
The **Notes** group box displays the results of the search.

(1) To sort, click a column heading.

(2) To print or view one case note, click the **Print** or **View** hyperlink next to the note.

Course: FamLink Fundamentals

Topic: Case Notes



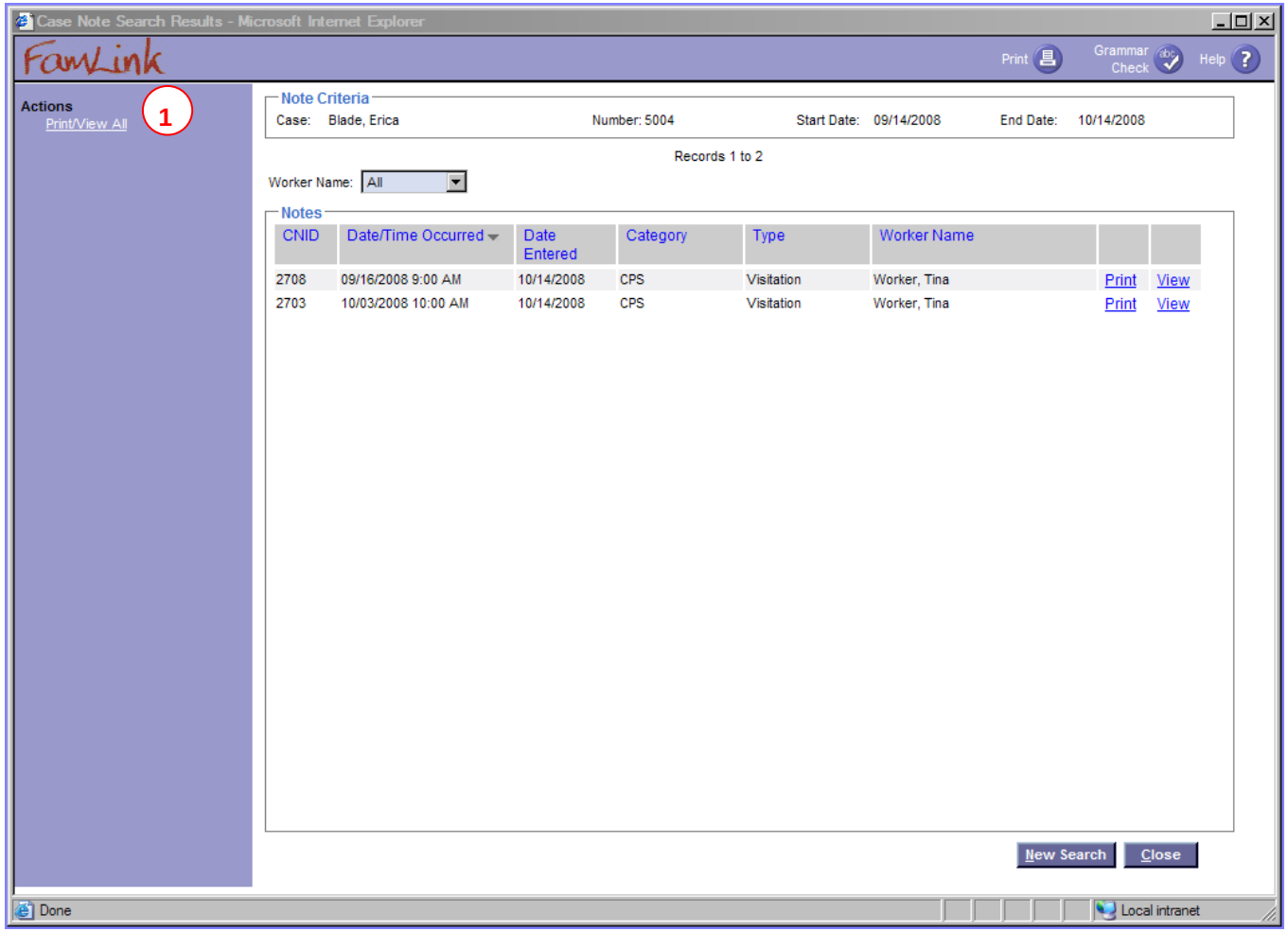
The Microsoft Word version of the case note information displays.

(1) To print, click the printer icon on the Word toolbar.

-or-

(2) On the **File** menu, click **Print**.

(3) When you're finished, click the **Close and Return to FAMLINK** button.

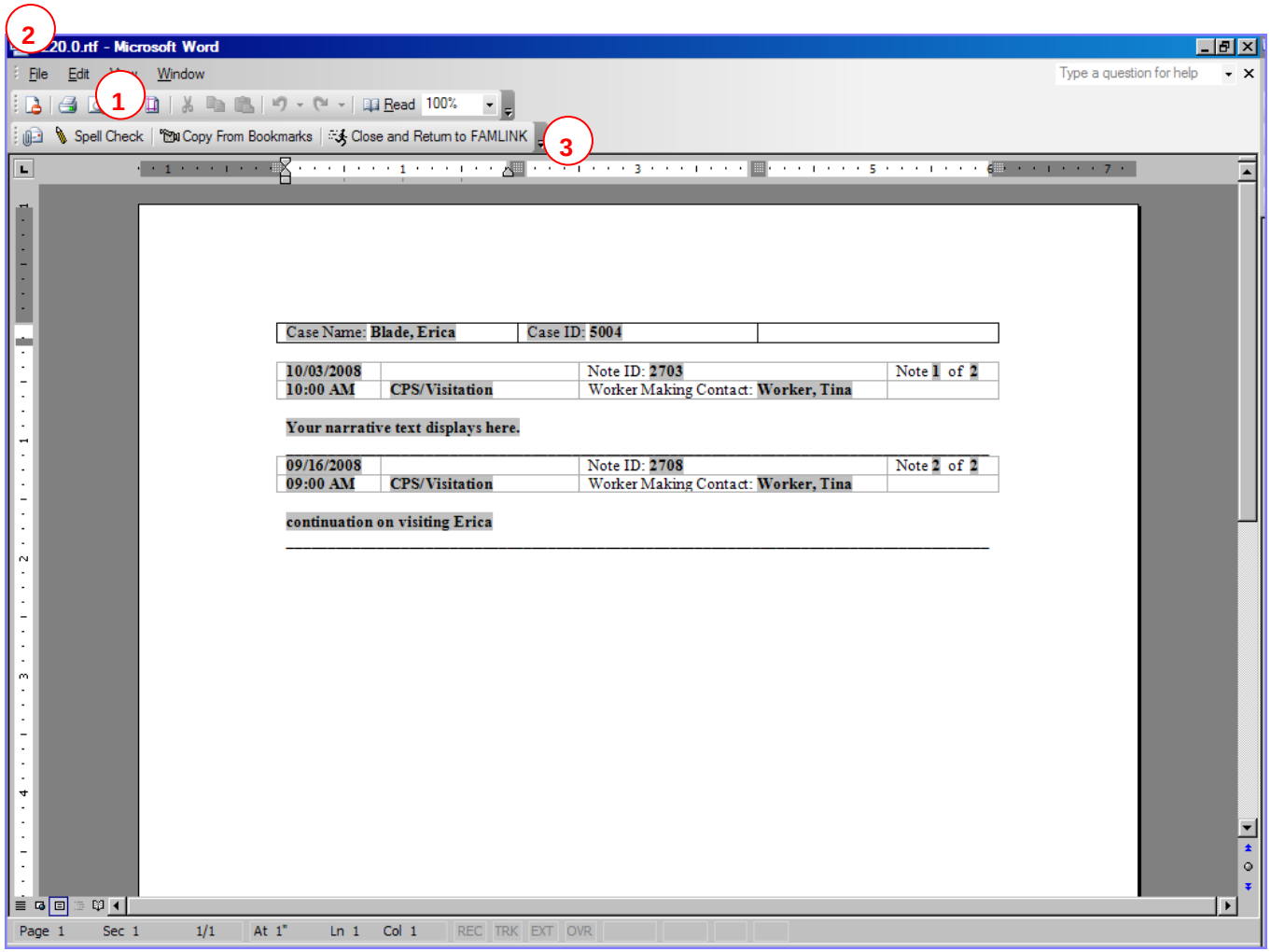


The **Case Note Search Results** page displays again.

(1) To print and view all notes, click the **Print/View All** hyperlink on the **Options** pane.

Course: FamLink Fundamentals

Topic: Case Notes



The Microsoft Word document displays.

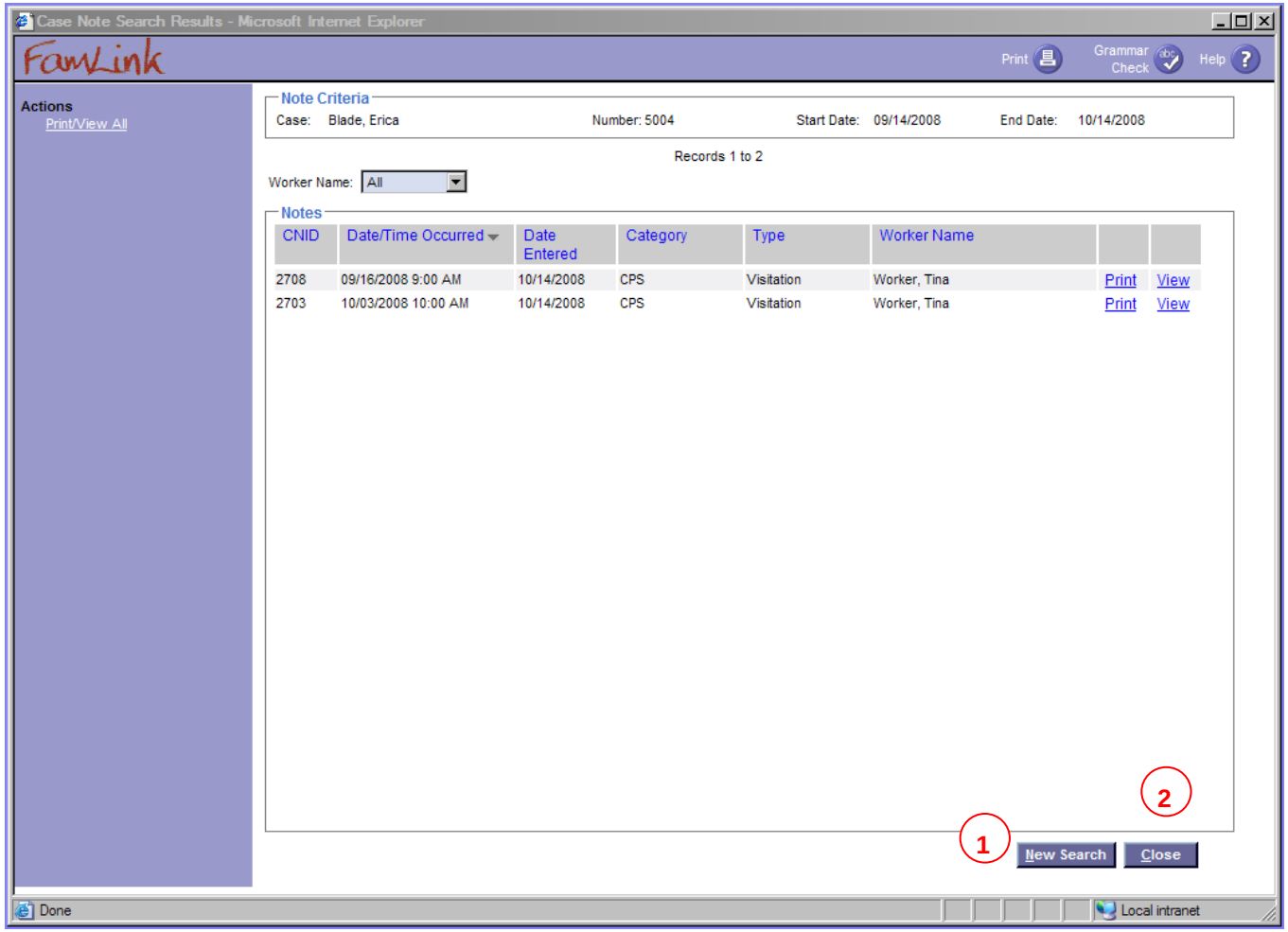
All notes display in the one Word document.

(1) To print, click the printer icon on the Word toolbar.

-or-

(2) On the **File** menu, click **Print**.

(3) When you are finished, click the ***Close and Return to FAMLINK*** button.



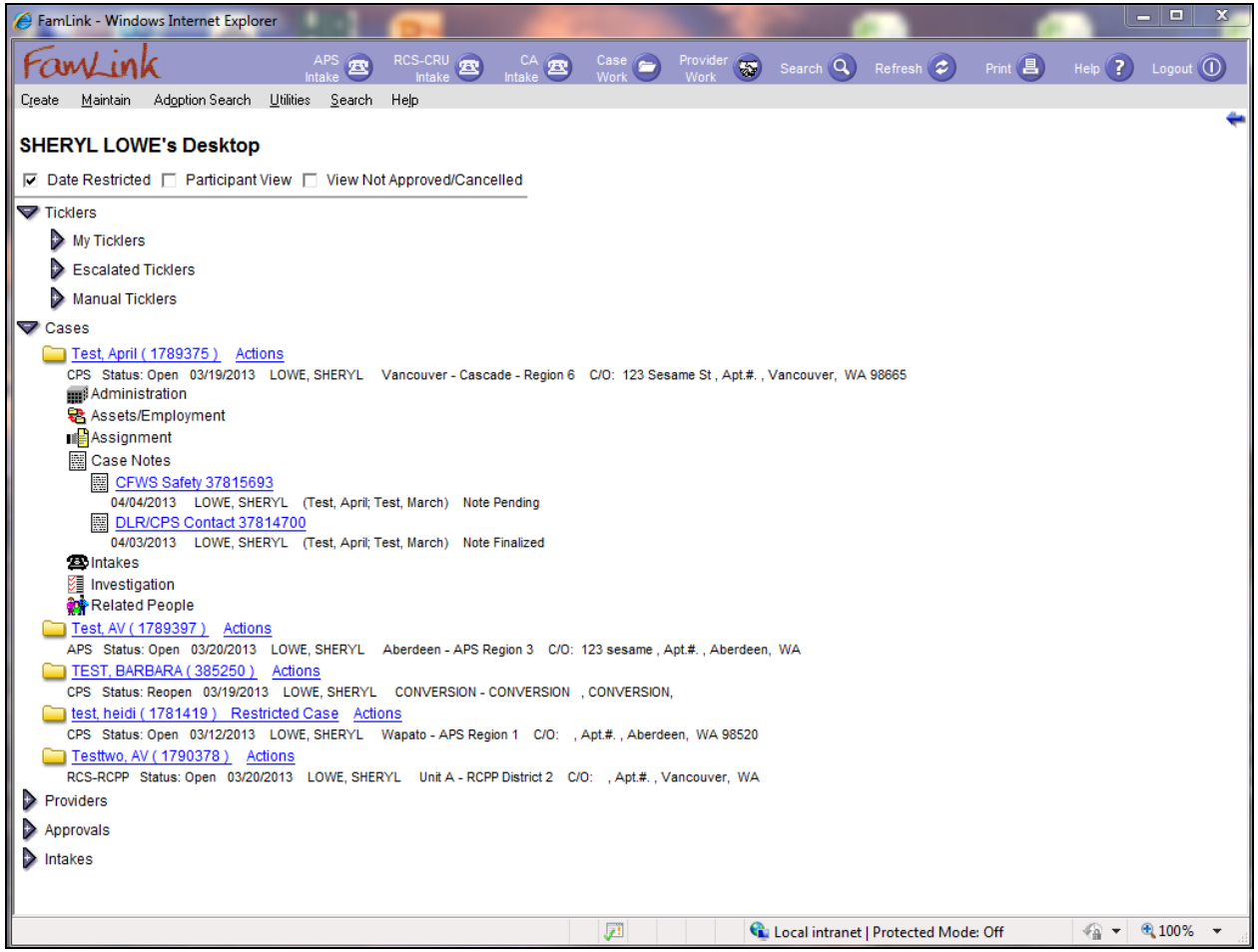
The **Case Note Search Results** page displays again.

(1) Start another search by clicking the **New Search** button at the bottom of the page.

(2) Click C**lose** to return to Desktop.

Course: FamLink Fundamentals

Topic: Case Notes


FamLink - Windows Internet Explorer
FamLink
APS Intake
RCS-CRU Intake
CA Intake
Case Work
Provider Work
Search
Refresh
Print
Help
Logout
Create
Maintain
Adoption Search
Utilities
Search
Help
SHERYL LOWE's Desktop
Date Restricted
Participant View
View Not Approved/Cancelled
Ticklers
My Ticklers
Escalated Ticklers
Manual Ticklers
Cases
Test, April (1789375) Actions
CPS Status: Open 03/19/2013 LOWE, SHERYL Vancouver - Cascade - Region 6 C/O: 123 Sesame St , Apt.# . , Vancouver, WA 98665
Administration
Assets/Employment
Assignment
Case Notes
CFWS Safety 37815693
04/04/2013 LOWE, SHERYL (Test, April; Test, March) Note Pending
DLR/CPS Contact 37814700
04/03/2013 LOWE, SHERYL (Test, April; Test, March) Note Finalized
Intakes
Investigation
Related People
Test, AV (1789397) Actions
APS Status: Open 03/20/2013 LOWE, SHERYL Aberdeen - APS Region 3 C/O: 123 sesame , Apt.# . , Aberdeen, WA
TEST, BARBARA (385250) Actions
CPS Status: Reopen 03/19/2013 LOWE, SHERYL CONVERSION - CONVERSION , CONVERSION,
test, heidi (1781419) Restricted Case Actions
CPS Status: Open 03/12/2013 LOWE, SHERYL Wapato - APS Region 1 C/O: , Apt.# . , Aberdeen, WA 98520
Testtwo, AV (1790378) Actions
RCS-RCPP Status: Open 03/20/2013 LOWE, SHERYL Unit A - RCPP District 2 C/O: , Apt.# . , Vancouver, WA
Providers
Approvals
Intakes
Local intranet | Protected Mode: Off
100%

The FamLink Desktop displays.

You have completed the **Case Notes** topic in the FamLink User Manual.